

Zoho Books in IC One

Manage accounting tasks from an AI
conversation

Attach a **photo** or **PDF**, request an **analysis** or **draft**, and review the result before any information is recorded in **Zoho Books**.



FINANCIAL DOCUMENTS

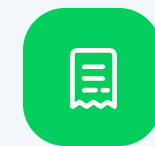
When an accounting task starts with a file, there is still a lot of **work** to do

A **photo of an invoice**, a **bank statement PDF**, or a question about **accounts receivable** often starts a series of manual tasks.

The team has to open the document, interpret the information, find the related records in **Zoho Books**, and prepare the required action.

That process **takes time** and forces the team to move between **files, queries, and operational screens**.

Zoho Books in IC One lets you start that work directly from a conversation.



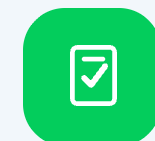
File

Photo, invoice, or bank statement PDF.



Zoho Books

Financial data and available records.



Result

Draft or analysis ready for review.

From document to a prepared task in **Zoho Books**

01

Attach the **file**

Upload a **photo or PDF** directly in the **IC One** chat.

02

Say what you **need**

Ask the **AI** to process the document according to the **accounting task** you want to complete.

03

IC One prepares the **result**

The solution combines information from the file with the data available in **Zoho Books**.

04

Review before **recording**

Write operations require **approval** before making changes in **Zoho Books**.

Accounting tasks started from a conversation



Turn invoices into drafts

Attach an image of an **invoice** and use the **extracted information** to prepare a draft in **Zoho Books**.



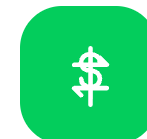
Reconcile banking information

Upload a **bank statement PDF** and compare it with the information recorded in **Books**.



Check accounts receivable

Request **periodic reports** on **accounts receivable** from the conversation.



Work with recurring accounting information

Exchange rates, **journal entries**, purchase orders, and intercompany operations.

AI prepares the work, with approval before **recording**

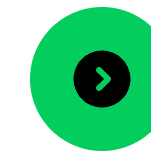
In **financial processes**, automation does not mean removing **control**.

Zoho Books in IC One separates preparation from execution: AI can analyze documents and prepare the result.

Write actions wait for the required **approval** before recording information in **Books**.

AI prepares the **work**

Extracts data, checks Books, and builds a reviewable proposal.



The team **approves**

Writing to Zoho Books remains subject to prior review.



The team reduces **operational tasks** without losing **control** over what gets recorded.

The conversational interface connected to your **accounting** information

- 

Attach **financial documents** and request the task from the same **work environment**.
- 

IC One uses **file processing** and information available in **Zoho Books**.
- 

The **result** is ready to review before approving any **record**.

IC One

Zoho Books connected

Chat with **file**



bank-statement.pdf
Financial document
attached in IC One.

Compare this PDF with Zoho Books
and prepare a reconciliation
proposal.

Pending approval

Document

Bank statement uploaded
from chat

Matches

Transactions linked with Books

Result

Prepared proposal, no
changes recorded



Writing to Zoho Books waits for team
review.

 InterConnecta | **Zoho Books in IC One**

Brochure 06 / 08

Designed for teams that work in **Zoho Books** every day

This solution can be useful for organizations that receive **financial documents**, query **accounting information** regularly, and want to bring in **AI** while keeping approval over write operations.



Receive **invoices** and other financial documents as photos or **PDFs**.



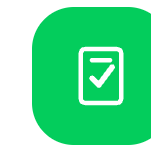
Spend time moving **information from files** into Books.



Need to query **financial information** on a recurring basis.



Manage **reconciliations, accounts receivable**, or other accounting tasks.



Want to use **AI** without losing **prior review** over writing to Books.

Zoho Books + IC One to turn documents into prepared work

InterConnecta implements this capability inside **IC One**, combining a **conversational interface**, file processing, and information available in **Zoho Books**.

How much time does your team spend turning financial documents into tasks inside Zoho Books?

[Talk to an InterConnecta specialist](#)