

| AI TOOLS - IC ONE

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.



STEP BY STEP

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**.

WHAT YOU CAN DO

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**.



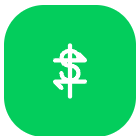
Reconcile banking information

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.



IDEAL TEAMS

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