



CLIENT GUIDE

Terra Mater XoomAgent™ User Guide

How to use XoomAgent™ in Discord channels and threads, request workflows, create skills and get useful outcomes from your approved XoomAgent™ employees.

ENVIRONMENT

Terra Mater uses Discord as the communications platform for its managed XoomAgent™ environment.

MAIN RULE

Choose the right channel, start a clearly named thread for the task, then mention **@XA-TerraMater** when needed.

WORKFLOWS

For new workflows, use the XoomAI request form so our team can build it correctly.

Workflow request form: <https://tally.so/r/eqvWzx>

Use this whenever you want a repeatable process automated, a new skill created, or a business workflow connected to your systems.

What This Guide Covers

- How to talk to the agents in Discord
- How to start and use a clearly named Discord thread
- How Terra Mater channels should be used
- What can be automated

1. How XoomAgent™ Works

XoomAgent™ is your managed AI operations layer inside Discord. Terra Mater uses the XoomAgent™ on Discord in one main Discord environment, with channels and agents organised around the business areas that need support.

PLATFORM

XoomAgent™ on Discord

One managed environment for leadership, customer service, growth, finance, operations, people, media, analytics and engineering support.

ACCESS

Discord channels and agents

Team members choose the right channel, start a clearly named thread, then mention the relevant XoomAgent™ employee when needed.

WORKFLOWS

Built progressively

Repeatable processes can be turned into workflows once XoomAI has the steps, examples, system access and approval rules.

Important: In a shared channel, an agent will not respond unless you tag it. This prevents agents from jumping into every conversation.

The Basic Interaction Flow

1

Choose the right channel.

Start in the channel that owns the task. Use #ceo for company-wide priorities and approvals, or the relevant head-of channel for functional work.

2

Start a new thread for the task.

Give the thread a clear, descriptive name so the task is easy to find and review.

3

Add the request and mention the right employee.

Write the request with the relevant context, then mention @XA-TerraMater when the employee needs a direct prompt.

4

Approve external actions.

Review and approve emails, client messages, file changes, calendar actions and anything externally visible.

2. Channels and What They Are For

Your Discord workspace is where the Terra Mater team uses XoomAgent™. The XoomAgent™ on Discord keeps work organised by function, team, agent and workflow inside one main environment.

XoomAgent™ on Discord

AREA	CHANNELS	USE IT FOR
CEO	#ceo	Executive support, company priorities, strategic planning, cross-functional decisions, management summaries and high-level approvals.
Customer Success	#head-of-customer-success	Customer enquiries, service updates, complaint triage, hire follow-up, onboarding, review requests and customer retention actions.
Growth	#head-of-growth	New hire and excavation enquiries, lead qualification, quote preparation, follow-up drafts, partnerships and revenue growth planning.
Finance	#head-of-finance	Invoice preparation, debtor follow-up drafts, expense and document checks, job profitability summaries, Xero preparation and financial reporting.
Operations	#head-of-operations	Hire scheduling, excavation job planning, equipment allocation, daily run sheets, site requirements, handovers, SOPs, maintenance coordination and operational follow-up.
HR & People	#head-of-hr-people	Staff onboarding, role documentation, licences and competency records, toolbox communication drafts, policies, leave processes and people-related task preparation.
Media	#head-of-media	Social content, project highlights, equipment promotion, campaign ideas, review responses, website copy and approved brand material.
Analytics	#head-of-analytics	Utilisation reports, revenue and margin summaries, lead conversion, customer trends, fleet performance, job insights and KPI reporting.
Engineering	#head-of-engineering	Technical integrations, data connections, workflow design, system troubleshooting, access requirements and approved platform changes.

Note: Use the channel that best matches the task. Voice calls can support live discussion, but requests, files, decisions and approved outputs should remain in the relevant text channel or thread so the right context is retained.

2. Channels and What They Are For

How To Use Discord Threads

In Discord, choose the channel that owns the task and start a new thread with a clear, descriptive name. Add the request and relevant context, then mention the appropriate XoomAgent™ employee when needed. Keep follow-up questions, clarifications, files and approvals in that same thread.

THREAD TYPE	USE IT FOR	GOOD CONTEXT TO INCLUDE
Customer / Quote	Customer enquiries, quote preparation, follow-up drafts and next actions in #head-of-customer-success or #head-of-growth.	Customer name, contact details, requested equipment or work, site location, dates, job scope, prior messages and required next action.
Hire / Excavation Job	Planning and coordinating a specific hire or excavation job in #head-of-operations.	Job reference, customer, site, dates, scope, equipment, attachments, operator requirements, access constraints, safety notes, status and blockers.
Fleet / Maintenance	Equipment availability, service reminders, defects, repairs, inspection records and maintenance coordination.	Asset name or number, current location, hours or kilometres, issue, urgency, required parts, service provider and return-to-service date.
Admin / Finance	Invoice checks, document extraction, purchase records, debtor follow-up and finance task preparation in #head-of-finance.	Relevant file, job or invoice reference, source system, checks required, due date and who must approve the final action.
People / Safety	Onboarding, licences, competencies, toolbox topics, policy drafts, incident information and compliance preparation in #head-of-hr-people or #head-of-operations.	Person or team, site or equipment involved, dates, source documents, confidentiality level and required review or approval.
Workflow / Integration	Mapping a repeatable process or connecting a business system through #head-of-engineering or the relevant functional channel.	Trigger, current steps, systems, owner, examples, exceptions, desired output, access status and approval points.

@XA-TerraMater please review this lead enquiry, summarise the opportunity, identify missing information and draft a warm follow-up email for approval.

After the employee replies, keep every follow-up in the same thread:

Make it shorter and more direct.
Add a question asking whether they want a call this week.
Now turn it into a version I can send on LinkedIn.

3. How To Ask For Useful Work

The more specific your request, the better the agent can help. You do not need to write a perfect prompt, but the agent needs enough context to understand the outcome you want.

Good Requests Include

- The task or outcome
- Who the work is for
- Relevant files, screenshots or links
- Preferred tone or format
- Deadline or urgency
- What needs approval before sending

Avoid

- Vague requests like "fix this" without context
- Putting several unrelated tasks in one thread
- Asking an agent to send external messages without review
- Uploading files without explaining what to do with them
- Adding a new topic to an old unrelated thread

Prompt Examples

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@XA-TerraMater summarise this client email in 5 bullets, identify what they need from us, and draft a reply in a warm professional tone. Do not send it.
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@XA-TerraMater turn these notes into a step-by-step SOP. Include trigger, inputs, process, checks, approval point and final output.
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@XA-TerraMater compare these two documents and tell me what changed, what matters, and what questions we should ask before approving.
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```
@XA-TerraMater create a follow-up checklist for this new lead. Prioritise revenue impact and make it easy for the team to action today.
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Best practice: Ask the agent to draft, structure, summarise, compare, extract, prepare or check. For live business workflows, have XoomAI build the workflow so it is repeatable and reliable.

4. What Can Be Automated

XoomAgent™ is strongest when it is given repeatable business processes with clear inputs, clear decision points and a clear output. Below are practical examples Terra Mater can consider.

AREA	EXAMPLE AUTOMATIONS
Hire & Job Intake	Enquiry summaries, missing-information checklists, job briefs, quote preparation, customer follow-up drafts and confirmed booking handovers.
Scheduling & Operations	Daily run sheets, equipment and operator allocation, site-readiness checklists, handover notes, recurring reminders and exception reporting.
Fleet & Maintenance	Service reminders, defect summaries, maintenance planning, inspection follow-up, equipment availability snapshots and downtime reporting.
Customer Communication	Booking confirmations, pre-start information, progress updates, delay notices, completion follow-up and review-request drafts.
Finance & Administration	Document extraction, invoice preparation, purchase and expense checks, debtor follow-up drafts, job-cost summaries and weekly finance briefs.
People, Safety & Compliance	Onboarding checklists, licence and competency reminders, toolbox communication drafts, policy summaries and compliance action registers.
Marketing & Growth	Project case studies, equipment availability posts, social content, campaign ideas, lead follow-up and monthly content planning.
Management Reporting	Weekly operating summaries, fleet utilisation, lead conversion, revenue and margin snapshots, overdue actions, risks and management briefs.

Good Workflow Candidates

- The task happens repeatedly.
- The process has known steps.
- The team can explain what a good output looks like.
- The process uses documents, emails, forms, CRM records, calendar events or standard data.
- There is a clear approval point before anything is sent externally.

Poor Workflow Candidates

- One-off tasks with no repeat value.
- Processes nobody can clearly explain yet.
- Tasks requiring unsupported system access or missing credentials.
- Decisions that require a human owner, legal sign-off or commercial judgement.

5. Creating Skills and Workflows

A skill is a reusable instruction set that teaches an agent how to perform a specific task in Terra Mater's preferred way. A workflow is a repeatable process that may involve multiple steps, approvals, systems, files or people.

Recommendation: XoomAI should create and maintain production workflows for Terra Mater. This reduces broken automations, unclear permissions, inconsistent outputs and unapproved external actions.

How To Request A Workflow

- 1 Fill in the workflow request form.**
<https://tally.so/r/eqvWzx>
- 2 Describe the process as it works today.**
Include trigger, steps, systems, files, examples, exceptions, approvals and what the final output should look like.
- 3 Attach examples.**
Good and bad examples help the agent learn what quality looks like.
- 4 XoomAI builds and tests it.**
Our team designs the skill or workflow, tests it, then confirms how the team should use it.
- 5 Use it through Discord.**
Once ready, the team can trigger the workflow through the relevant agent or channel.

5. Creating Skills and Workflows

What To Include In The Request

TRIGGER

What starts the workflow: new email, form submission, meeting note, uploaded file, manual request or CRM stage change.

INPUTS

The documents, messages, fields, links or system records the agent needs.

STEPS

The current human process, written as simply as possible.

APPROVAL

Who must review before anything is sent, posted, changed or deleted.

OUTPUT

The final result: email draft, report, task list, CRM note, client summary, data file or recommendation.

Tip: The clearer the request, the faster XoomAI can design a workflow that is reliable, reviewable and safe to use in production.

6. Tips and Tricks

Use One Post Per Task

Keep one client issue, workflow or request in one clearly named thread. This helps the employee retain the right context and makes review easier.

Give The Agent Examples

Upload a previous email, proposal, SOP or report and say "match this style". Examples improve quality quickly.

Ask For Options

For wording, strategy or decisions, ask for two or three options with pros and cons.

Use Review Language

Ask the agent to find gaps, risks, missing info, assumptions or next actions before asking it to draft the final output.

Keep Sensitive Work Clear

For commercial, HR, legal or client-sensitive work, ask for a draft or recommendation only. A human should approve final action.

Correct It Once

If an output is close but not right, reply with the correction in the same thread. The agent can revise and the feedback helps shape future workflow instructions.

Useful Follow-Up Phrases

Make this more concise.
Make it warmer but still professional.
Turn this into an action checklist.
What information is missing?
What should we ask the client next?
Create a version for email and a version for Discord.

7. Guardrails

XoomAgent™ is designed to accelerate work, but human approval still matters. Treat the agent as a capable assistant, not an unchecked decision-maker.

Human Approval Required

- Sending client emails or messages
- Changing records in business systems
- Posting externally
- Deleting, moving or overwriting files
- Commercial, legal, HR or sensitive decisions

Good To Automate

- Drafting and summarising
- Checklist creation
- Information extraction
- Internal task preparation
- First-pass reporting and review

Security Notes

- Do not paste passwords, API keys or recovery codes directly into Discord.
- Use the approved credential-sharing method provided by XoomAI.
- Only upload files that are relevant to the task.
- Keep client-sensitive work in the correct private channels or chats.
- Report unexpected agent access, odd behaviour or permission issues to XoomAI.

Need A New Automation?

Start with the workflow request form so XoomAI can design the workflow properly, confirm required access and build a reliable skill for the Terra Mater team.

Form: <https://tally.so/r/eqvWzx>

8. Troubleshooting and Quick Start

When Something Does Not Work

If an agent gives an incorrect or unhelpful answer, post the issue in the relevant support channel with:

- The agent name
- The channel and thread name
- What you asked
- What response you received
- What should have happened instead

Quick Start Checklist

- Open the correct Discord workspace and channel.
- Start a new thread for the task.
- Give the thread a clear, descriptive name.
- Mention **@XA-TerraMater** when the employee needs a direct prompt.
- Keep requests, files, clarifications and approvals in the same thread.
- Attach context and examples where possible.
- Use the workflow request form for repeatable automations.
- Review and approve anything before it goes outside Terra Mater.

Fastest Path To A Good Result

Choose the right Discord channel, start a clearly named thread, add the request and relevant context, mention the right XoomAgent™ employee when needed, then keep the files, clarifications and approvals together in that thread.

Reminder: Agents are there to prepare, summarise, draft, check and automate. Anything client-facing or externally visible should be reviewed before it goes out.