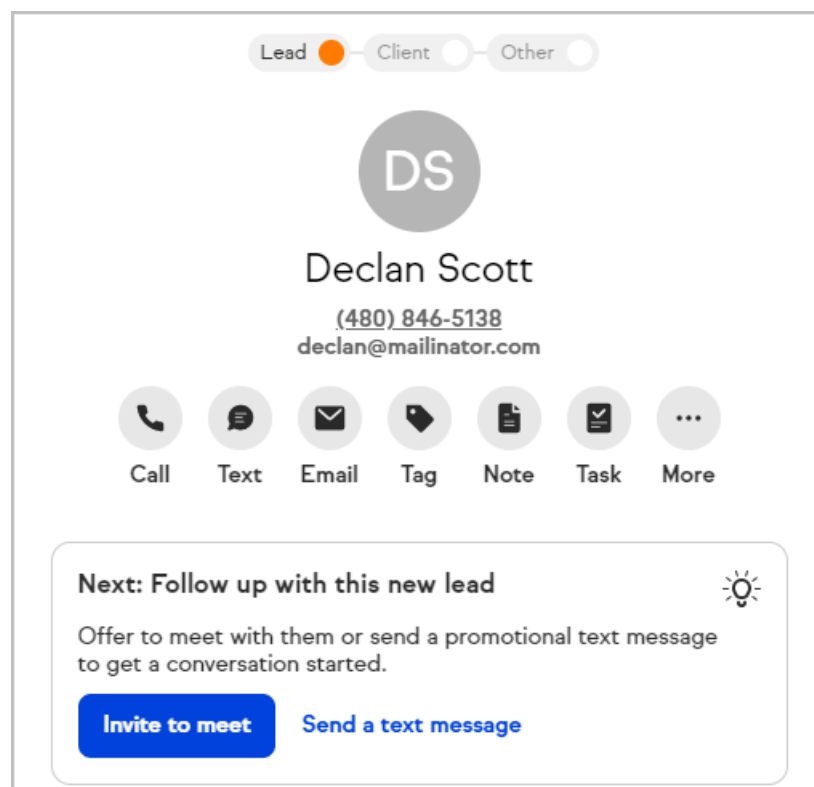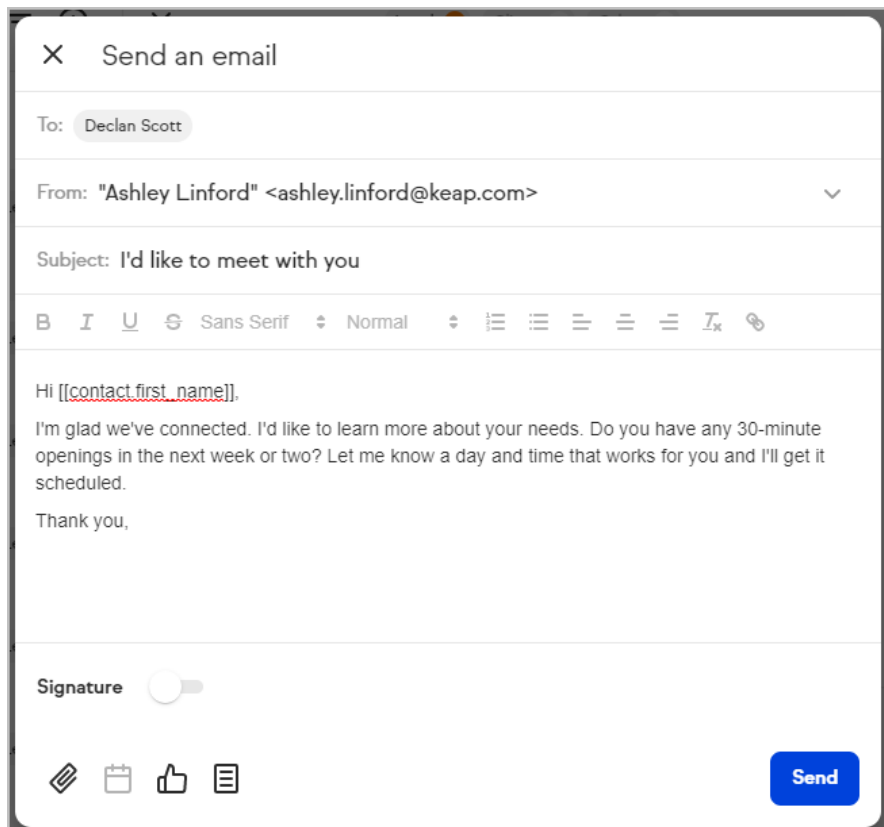# Recommended Actions for New Leads ⸝

This article applies to:

When a contact is marked as a lead, and has not yet been interacted with (no email sent, no text sent, no call made), Keap will surface up a recommendation to send an invite to meet (email), or a text to connect or send a promotional offer
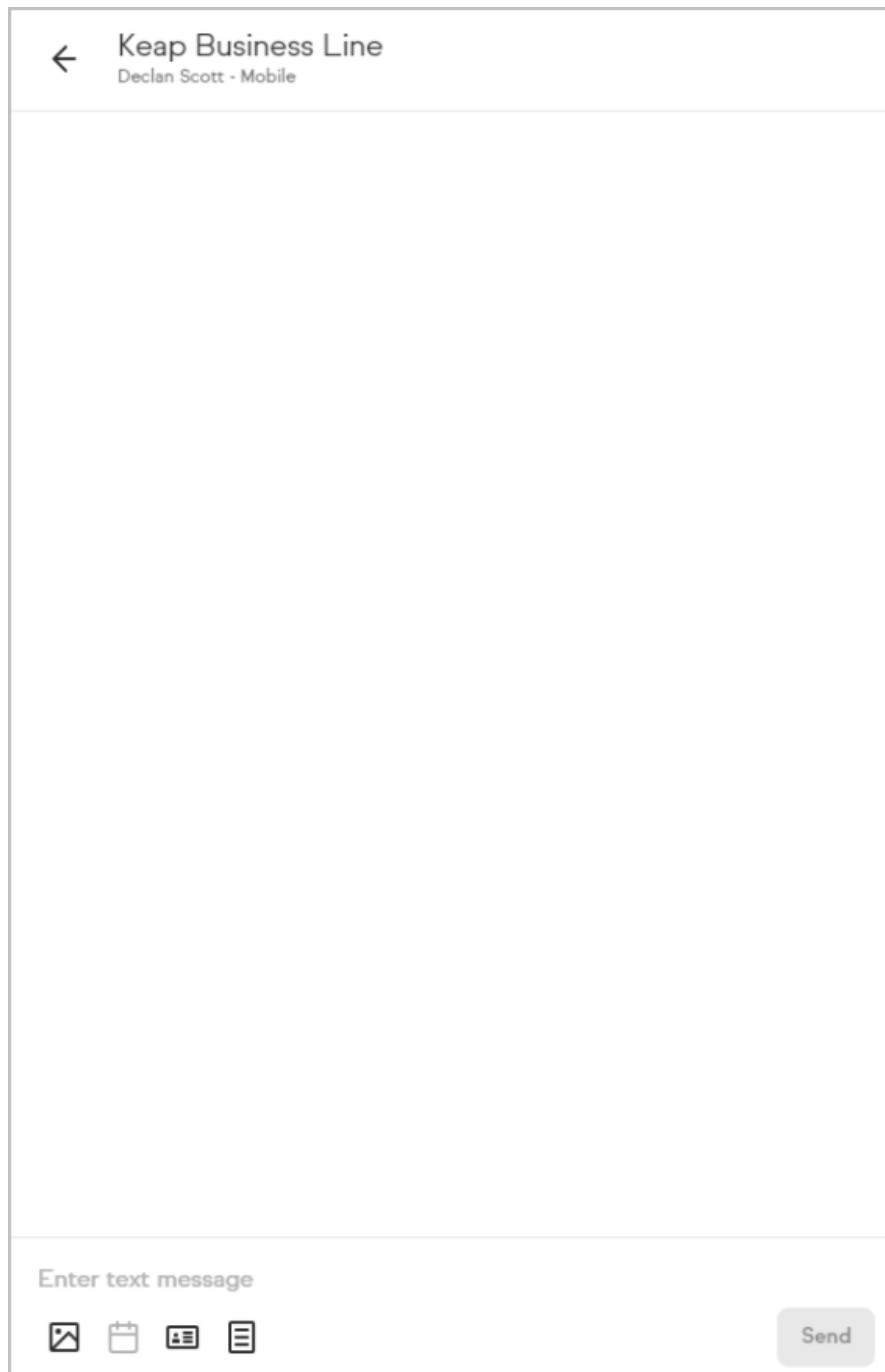
1. Navigate to **Contacts**

2. Click on a contact that has been added in the last 30 days and has a contact type of Lead, OR a contact has had their contact details updated in the last 30 days and has a contact type of Lead

3. If the User does NOT have Appointments setup, and there has NOT been any email, text or phone call communication with the contact, but there is an email address, then a recommended action to **Invite to meet** will display
    1. If there has NOT been any email, text or phone call communication with the contact, and there is a text capable phone number then a recommended action to **Send a text message** will display

    2. If the contact fits the criteria for both, both recommended actions will display

4. Click on **Invite to meet**, and the Send an email modal will open, with a template already inserted

5. If there are multiple email addresses, when you click Invite to meet a dropdown will appear with all of the email addresses to choose from

6. Click on **Send a text message**, and the text message side panel will open

Keap Business Line
Declan Scott - Mobile

Enter text message

Send

7. If there are multiple phone numbers, when you click **Invite to meet** a dropdown will appear with all of the text-capable phone numbers to choose from

8. After the email or text has been sent, then the recommended action card will show as **completed**

9. Refreshing or navigating away from that contact record and back to it, will result in the recommended actions card no longer displaying

FAQ

What is the logic for a contact being considered a new lead?

- Added in the last 30 days AND has a contact type of Lead

- OR a contact that has had their contact information updated in the last 30 days AND has a contact type of Lead