Creative requests after onboarding

07/31/2025 4:39 pm EDT

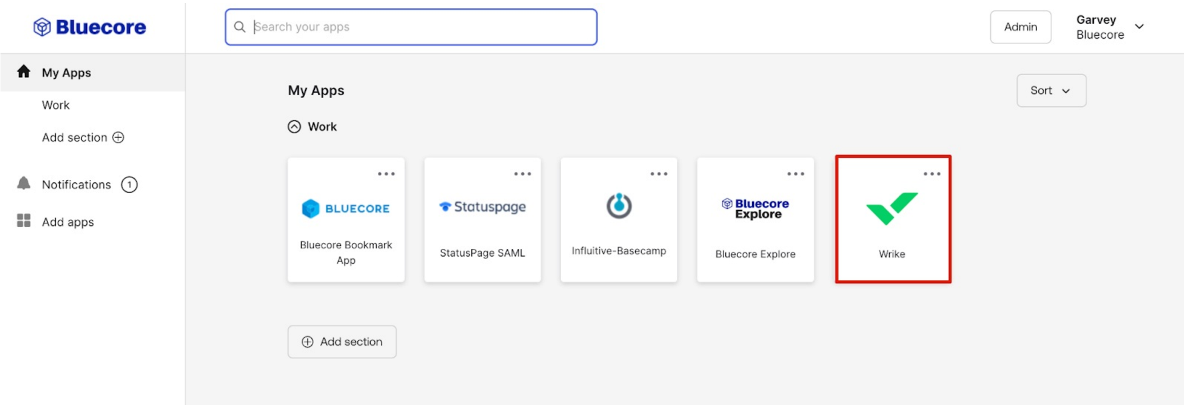
Instead of building or editing Communicate and Site campaigns, you can purchase campaign services as part of your Bluecore contract. When you do this, use the Wrike platform for submitting and tracking campaign requests.

Talk to your Customer Success Manager if you're interested in purchasing campaign services or if you have questions about your current contracted campaign services.

Access and login

You'll need a Bluecore-provided Wrike login to access Wrike for submitting and tracking campaign requests. Your CSM will begin the process to get you access - speak to your CSM.

Wrike access requires that you already have access to the Bluecore platform. Once your access request has been granted, you'll receive an email invitation to join Wrike to the same email address you use for the Bluecore platform. You can also access the tool by going to https://bluecore.okta.com/ and selecting "Wrike" from My Apps:



If you currently use an external IDP to access Bluecore, you'll use the same login for Wrike as well.

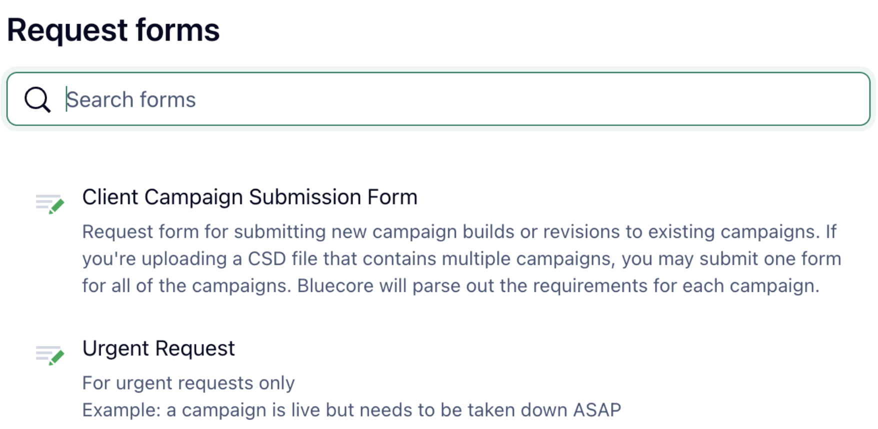
If you have trouble logging in, reach out to support@bluecore.com.

Submitting requests

To submit a request, click the **+ Create** button and select **Request**.

You'll see two options:

- Client Campaign Submission Form
- Urgent Request



You can also access these request forms directly.

Use the Client Campaign Submission Form for any requests to create a new campaign or update an existing one (email, SMS/MMS, or Site).

Use the Urgent Request form for any urgent updates needed, such as editing text on an email that needs to be removed immediately, or turning off a campaign that should not be running.

Client Campaign Submission Form

Use this form to submit campaign details and assets needed to complete your request.

There are four categories of campaigns in the form:

- Email Campaign (including Trigger, Batch, and Transactional campaigns powered by Bluecore Communicate)
- Site Campaign (campaigns powered by Bluecore Site)
- SMS/MMS Campaign
- Global Widget (these include time-based banners, headers, and footers that are added to email campaigns. Learn more about Global Widgets)

For each of these categories, you have the option to submit your request through the form or with an accompanying Campaign Specifications Document (CSD).

If you choose the CSD option, you will be asked to attach a CSD that contains campaign details. If you choose the form option, you'll be asked to enter all campaign details within the form itself.

Submitting via CSD

This option will allow you to submit multiple campaigns at once. It also allows you to use the document to collect your campaign details and collaborate with team members before submitting, instead of having to fill it out all at once.

Download a template CSD from Bluecore. If you already have a CSD with your Bluecore team, you can use that.

To use the CSD, find the tab in the template that corresponds to the type of request you're creating, then create duplicates of the tab as necessary

Although you will be able to see requests across your account by default, you will only be able to open and comment on tickets that you created. If you need to make sure a team member has access to a ticket, make sure to add them as a collaborator in the request form. If you need to add them after submitting, add a comment to the existing ticket and ask that the additional team member be added.

CSD Video Walkthrough:

Escalations

If you need to escalate an issue or concern, you have two options:

- Mention @Bluecore Leadership in the comment section of an existing Wrike ticket. This will immediately alert our leadership team.
- Submit the Urgent Request form: This form is designed to flag urgent matters and will bring your escalation to the attention of our leadership team

Tracking Requests with Reports

After a request is submitted, it is processed by our team. We will take the following steps:

- Separate requests into individual tickets as needed (if multiple campaigns were submitted in one request and/or if it is a Site campaign that requires both a mobile and desktop version to be created).
- Create a requirements table in the ticket description. This will be our source of truth for the requirements needed. Any additional updates to requirements will also be documented there.

While your request is being processed, you can see the ticket under "Created by Me". You can access the ticket in the menu.

Once the request has been processed and any additional tickets are created, you'll be able to track the tickets in an account-specific report. You can find this report by clicking on **Reports**.

Campaign Services: Test Partner (Red Status = Requires Client Action) Shared by Garvey P Subscribe Export as Excel

Group by: Status Expand all Collapse all Updated at 8:03 pm Leave feedback

	Title		Status	Campaign Launch Date	Created By
1	Requirements Incomplete	2			
2	test_namespace2 | MLK Sale 2025 (Desktop)		Requirements Incomplete	01/24/2025	Garvey Paraiso
3	test_namespace2 | MLK Sale 2025 (Mobile)		Requirements Incomplete	01/24/2025	Garvey Paraiso
4	Build	1			
5	test_namespace | MLK Sale 2025 (Desktop)		Build	01/24/2025	Garvey Paraiso
6	QA Ready	1			
7	test_namespace | MLK Sale 2025 (Mobile)		QA Ready	01/24/2025	Garvey Paraiso
8	Client Review	4			
9	test_namespace | Valentine's Day Sale 2025 (Desktop)		Client Review	01/29/2025	Garvey Paraiso
10	test_namespace | Valentine's Day Sale 2025 (Mobile)		Client Review	01/29/2025	Garvey Paraiso
11	test_namespace2 | Valentine's Day Sale 2025 (Desktop)		Client Review	01/29/2025	Garvey Paraiso
12	test_namespace2 | Valentine's Day Sale 2025 (Mobile)		Client Review	01/29/2025	Garvey Paraiso

The report will show all tickets grouped by status. Any blue status indicates that Bluecore is working on the ticket. Any red status indicates that we are waiting on approval or additional details from you.

Tracking Requests with Dashboards

If you are a partner who submits a high volume of campaign requests, you'll also have a dedicated dashboard that you can use to track your requests. You'll find this under "Dashboards."

Refer to specific documentation that we'll send to you to navigate your specific dashboard.

Commenting and Approvals

You can comment on a ticket at any time to ask questions or provide updated requirements (note that updating requirements may lead to longer build times).

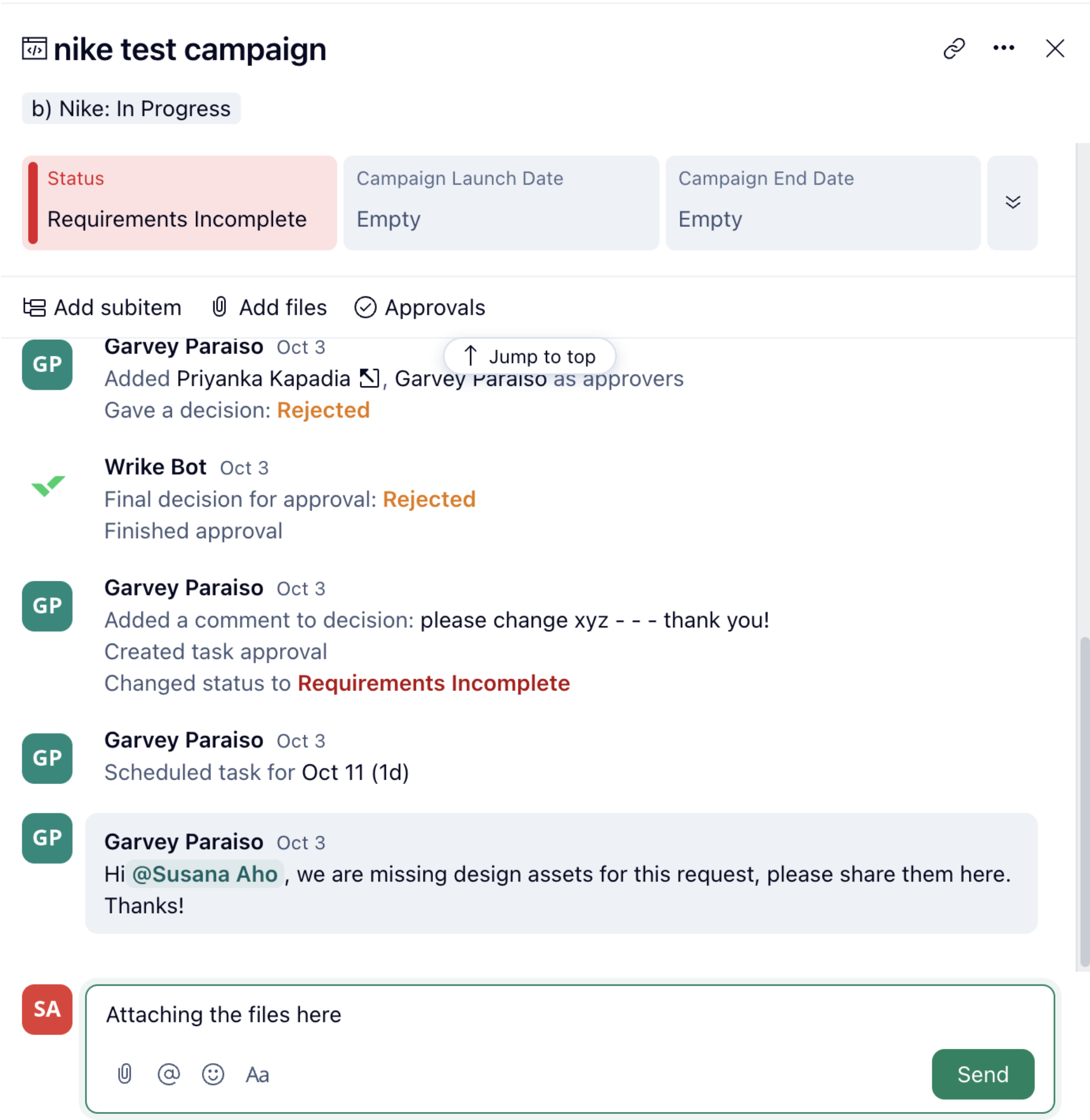
When a ticket is placed in either "Requirements Needed" or "Client Review" status, we'll need input from you on the campaign.

Requirements Needed

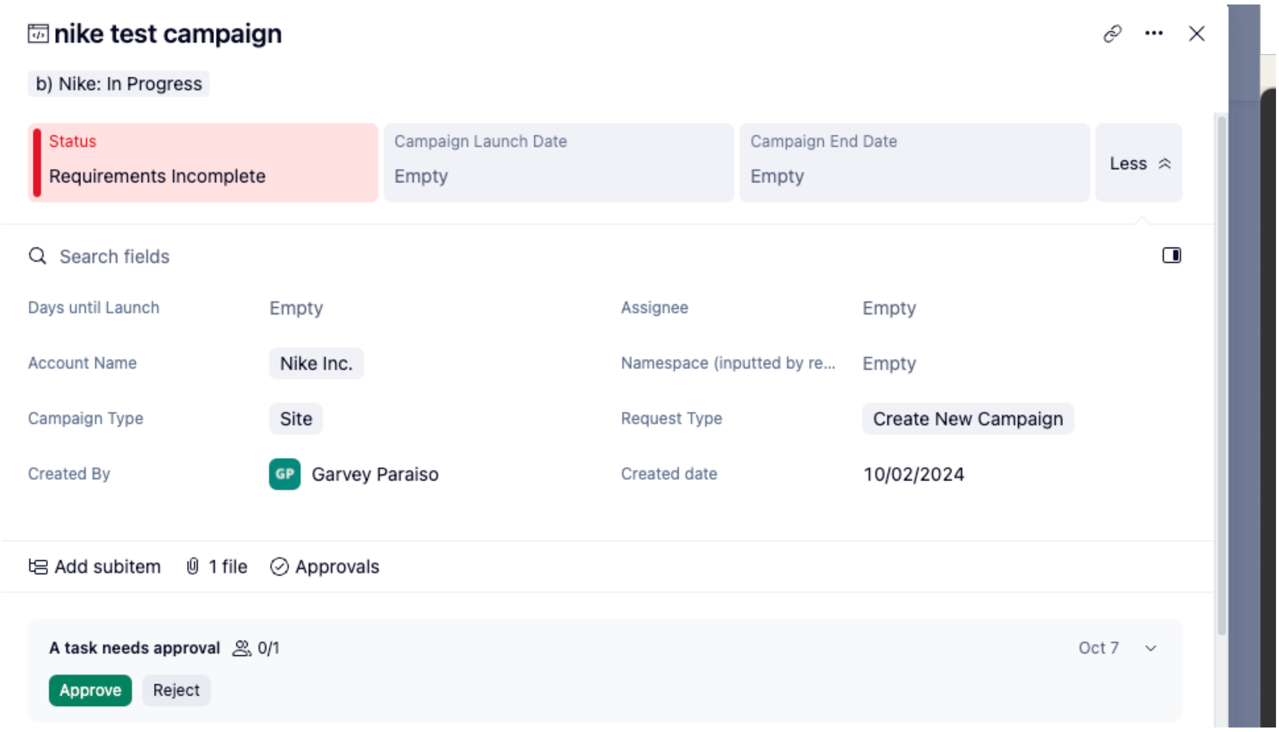
When a ticket is placed in this status, it means that we are missing information we need to build the campaign.

The creator of the ticket will be tagged in comments for specific requirements if they are missing (which will prompt in-app and email notification). Comment in the tickets to provide responses to requirements questions.

> ⓘ If you start to scroll on the page you'll see a "Last Update" button display. It will take you directly to latest comments



Once you’ve provided the missing requirements, click **Approve** in the approval section at the top of the ticket to let the team know you’ve responded to the request and it’s ready to be worked on.

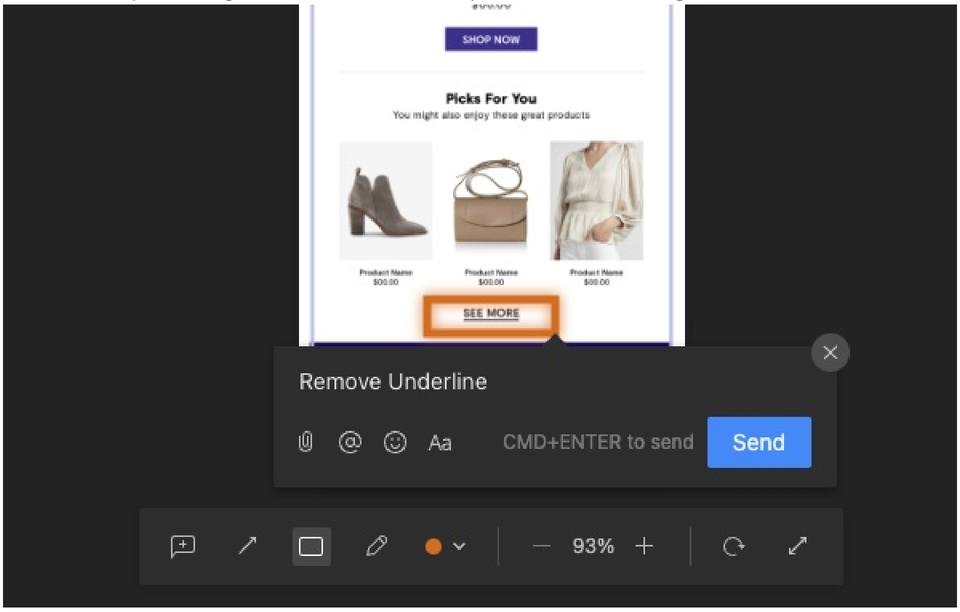


Client Review

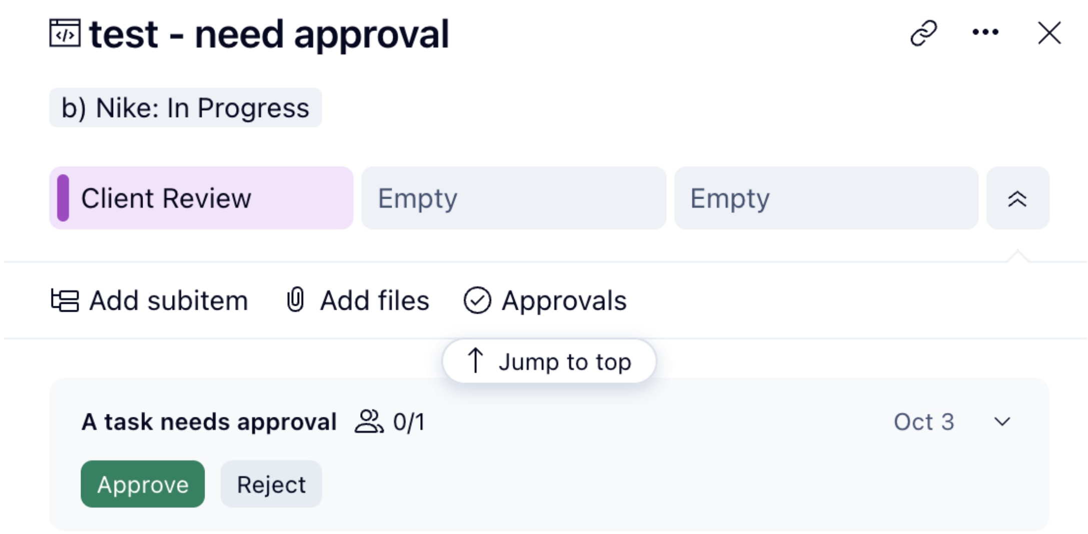
When a ticket is in this status, it means that the build is ready and we need you to review it and either provide additional feedback or provide approval to launch the campaign.

The creator of the ticket will be tagged in a comment (which will prompt in-app and email notification). The comment will contain both a screenshot of the campaign and a link to the campaign in Bluecore.

Use comments to provide campaign feedback or updates on requirements. You can also provide visual feedback by clicking into the screenshot provided and using the annotation tools within Wrike.



When you're done providing feedback or are ready to launch the campaign, use the **Approve** or **Reject** buttons at the top of the ticket.



Approve will move the ticket to the “Ready to Launch” status, where a member of Bluecore’s campaign team will publish the campaign.

Reject will move the ticket to the “Needs Update” status, where Bluecore will review, make the necessary updates, then push back to "Client Review."