

CaseBridge - Jira Epics, Stories & Tasks

This backlog is derived **directly from the Canonical CaseBridge PRD** and is structured for immediate Jira import and sprint planning.

EPIC 1: Platform Foundation & Architecture

Goal: Establish secure, multi-tenant, role-aware foundation.

Story 1.1: Project & Environment Setup

As a system I want a standardized project structure **So that** all teams build consistently

Tasks - Initialize React project with Tailwind & Shadcn UI - Configure Supabase project (Auth, DB, Storage) - Set environment variables & secrets - Setup linting & formatting rules

Story 1.2: Multi-Tenant Firm Architecture

As a platform I want strict firm-level isolation **So that** no data leaks across firms

Tasks - Create firms table - Add firm_id to all core tables - Define RLS policies by firm_id - Validate isolation with test users

EPIC 2: Authentication & Access Control

Benchmark: Clio, Ironclad

Story 2.1: Email/Password Authentication

As a user I want to securely log in **So that** I can access my workspace

Tasks - Implement Supabase Auth signup/login - Create login UI - Handle invalid credentials - Persist session on refresh

Story 2.2: Protected Routing & Role Guards

As a system I want to restrict routes by role **So that** users only see authorized screens

Tasks - Create ProtectedRoute component - Fetch role from profiles table - Redirect unauthorized users - Add inactivity timeout logic

EPIC 3: Firm & Admin Onboarding

Benchmark: Clio

Story 3.1: Admin Firm Registration

As an Admin Manager **I want** to create my firm account **So that** I can set up the platform

Tasks - Build multi-step registration form - Create firm record - Create admin profile - Redirect to admin dashboard

Story 3.2: Admin Dashboard Shell

As an Admin Manager **I want** a dashboard overview **So that** I can manage the firm

Tasks - Create dashboard layout - Add sidebar navigation - Implement empty states

EPIC 4: Team Invitation & User Management

Benchmark: PracticePanther, MyCase

Story 4.1: Invite Team Members

As an Admin/Case Manager **I want** to invite users **So that** they can join the firm

Tasks - Create invitations table - Build invite modal UI - Generate invite tokens - Send invite via Supabase Auth

Story 4.2: Accept Invitation & First Login

As a invited user **I want** to activate my account **So that** I can access my dashboard

Tasks - Build accept-invite route - Validate invitation token - Set password & activate profile - Redirect by role

Story 4.3: User Status Management

As an Admin Manager **I want** to suspend or deactivate users **So that** I can control access

Tasks - Add status field to profiles - Create audit_logs table - Build access management UI - Trigger auth disable logic

EPIC 5: Case (Matter) Management

Benchmark: Filevine, PracticePanther

Story 5.1: Create Legal Matter

As a Client/Case Manager I want to create a matter **So that** legal work can begin

Tasks - Create matters table - Implement matter creation form - Generate unique matter number - Display in dashboard

Story 5.2: Assign Case & Status Tracking

As a Case Manager I want to assign and update cases **So that** progress is visible

Tasks - Add status field & enums - Build assignment UI - Create case_logs table - Trigger notifications

EPIC 6: Document Management

Benchmark: Filevine, MyCase

Story 6.1: Upload Case Documents

As a Client I want to upload documents **So that** my case is supported

Tasks - Create documents table - Configure private storage bucket - Build upload component - Validate file size & type

Story 6.2: Review & Verify Documents

As a Case Manager I want to review documents **So that** evidence is validated

Tasks - Build document list UI - Add preview functionality - Add verified toggle - Log review actions

EPIC 7: Client Portal

Benchmark: MyCase

Story 7.1: Client Registration & Login

As a Client I want to create an account **So that** I can access services

Tasks - Build client signup form - Enable email verification - Create client dashboard

Story 7.2: Client Case Tracking

As a Client I want to see case status **So that** I know progress

Tasks - Build case list UI - Create milestone timeline - Fetch status updates

EPIC 8: Consultation Booking

Benchmark: Calendly

Story 8.1: Book Virtual Consultation

As a Client I want to book online meetings

Tasks - Create availability tables - Build booking calendar UI - Confirm appointment - Notify lawyer

Story 8.2: Book Physical Consultation

As a Client I want to book office visits

Tasks - Create offices table - Build location selection UI - Confirm booking & show directions

EPIC 9: Billing & Payments

Benchmark: Stripe Billing

Story 9.1: Invoice & Payment Processing

As a Client I want to pay online

Tasks - Create invoices & payments tables - Integrate Stripe Checkout - Handle webhooks - Generate receipts

Story 9.2: Payment History

As a Client I want to see my payments

Tasks - Build payment history UI - Add filters & status badges

EPIC 10: Notifications & Audit Logs

Benchmark: Ironclad

Story 10.1: System Notifications

As a user I want real-time alerts

Tasks - Create notifications table - Trigger notifications on events - Build notification UI

Story 10.2: Audit Logging

As an Admin I want an audit trail

Tasks - Log all sensitive actions - Build audit log viewer - Filter by user/date/action

EPIC 11: Platform Hardening & Readiness

Story 11.1: Security & Performance Review

Tasks - Validate all RLS policies - Test role escalation attempts - Performance testing

status: Jira-ready backlog – Approved for sprint planning