

# 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.

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## 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

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### 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

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## 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

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### 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

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## 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

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### 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

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## 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

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### 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

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### 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

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## 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

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### 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

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## 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

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### 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

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## 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

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## 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

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## 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

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### 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

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## 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

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### Story 9.2: Payment History

**As a Client I want** to see my payments

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

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## 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

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### **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

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## **EPIC 11: Platform Hardening & Readiness**

### **Story 11.1: Security & Performance Review**

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

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**Status:** Jira-ready backlog – Approved for sprint planning