

# CaseBridge - Canonical Product Requirements Document (PRD)

## 1. Product Overview

**Product Name:** CaseBridge

**Category:** Legal Case Management & Client Portal Platform

**Primary Market:** Law firms and professional legal service organizations (initially SME-mid-size, extensible to enterprise)

**Benchmark Platforms:** Clio, MyCase, PracticePanther, Filevine, Ironclad, Lawcus

### 1.1 Product Vision

CaseBridge is a **high-trust, role-based legal case management platform** that bridges law firms and their clients through secure onboarding, structured case workflows, document management, consultations, billing, and audit-grade governance.

The platform prioritizes:

- Security-by-default (RBAC, RLS, audit logs)
- Clear separation of roles and responsibilities
- Professional, calm, legal-tech UX
- End-to-end case lifecycle visibility for all stakeholders

### 1.2 Problem Statement

Most law firms struggle with:

- Fragmented tools for onboarding, case tracking, documents, and billing
- Poor client visibility into case progress
- Weak access control and auditability
- Inefficient internal delegation and notifications

CaseBridge solves this by providing **one unified, role-aware system** that manages legal matters from intake to resolution.

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## 2. Target Users & Roles

### 2.1 User Roles

Role	Description	Comparable Platforms
Admin Manager	Firm owner / system administrator	Clio Admin, Ironclad Admin
Case Manager	Operational lead managing cases	PracticePanther Manager
Associate Lawyer	Executes assigned legal tasks	Filevine Associate
Client	End customer receiving legal services	MyCase Client

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### 3. Core Platform Principles

1. **Role-first architecture** – Every screen, query, and action is role-scoped
  2. **Firm isolation** – No data leakage across firms (firm\_id enforced everywhere)
  3. **Auditability** – All sensitive actions are logged
  4. **Empty-state driven UX** – Clear next actions at every stage
  5. **Legal-grade trust** – Conservative colors, predictable flows, zero ambiguity
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### 4. Functional Scope (Modules)

#### 4.1 Authentication & Access Control

**Benchmark:** Clio, Ironclad

##### Features

- Email/password authentication
- Invitation-based onboarding for staff
- Session persistence & inactivity timeout
- Account lock after repeated failed attempts

##### Requirements

- Supabase Auth
  - Protected routes
  - Role verification on login
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#### 4.2 Firm & Admin Onboarding

**Benchmark:** Clio Firm Setup

##### Features

- Firm creation (name, website, size, practice area)
- Automatic Admin Manager role assignment
- Admin dashboard shell

##### Success Criteria

- Admin redirected to dashboard
  - Firm + profile created atomically
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#### 4.3 Team Invitation & Management

**Benchmark:** PracticePanther, MyCase

## **Features**

- Invite Case Managers, Associate Lawyers, Clients
- Role assignment via invitation token
- Pending / accepted / revoked states

## **Admin Capabilities**

- Suspend / deactivate users
  - View audit trail per user
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## **4.4 Case (Matter) Management**

**Benchmark:** Filevine, PracticePanther

### **Features**

- Create legal matters
- Auto-generated matter reference
- Assign case managers & associates
- Status transitions (Discovery, Trial, Settled, Closed)

### **Data Model**

- matters
  - milestones
  - case\_logs
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## **4.5 Document Management**

**Benchmark:** Filevine, MyCase

### **Features**

- Secure upload (PDF, DOCX, JPG, PNG)
- Case-linked storage
- Preview & download
- Review/verification by Case Manager

### **Security**

- Private storage buckets
  - RLS by firm\_id and role
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## **4.6 Client Portal**

**Benchmark:** MyCase

## **Features**

- Client registration & verification
  - View assigned cases
  - Track case status & milestones
  - Upload documents
  - Message firm (future phase)
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## **4.7 Consultation Booking**

**Benchmark:** Calendly (logic), Lawcus

### **Types**

- Virtual consultation
- Physical consultation

### **Features**

- Availability-based booking
  - Lawyer notification
  - Calendar integration (ICS)
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## **4.8 Notifications & Real-time Updates**

**Benchmark:** Filevine Activity Feed

### **Features**

- Case submission notifications
  - Status change alerts
  - Document upload alerts
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## **4.9 Billing & Payments**

**Benchmark:** Stripe Billing, PracticePanther

### **Features**

- Invoice generation
  - Stripe-hosted checkout
  - Payment success/failure handling
  - Receipt generation
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## **4.10 Audit Logs & Compliance**

**Benchmark:** Ironclad

## Logged Events

- User access changes
  - Case updates
  - Status transitions
  - Document verification
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## 5. Non-Functional Requirements

### 5.1 Security

- Row Level Security (Supabase)
- Role validation on every request
- Private storage buckets

### 5.2 Performance

- Optimistic UI updates
- Lazy loading for documents

### 5.3 Scalability

- Multi-tenant by design
  - Future enterprise readiness
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## 6. Technology Stack

Layer	Technology
Frontend	React, Tailwind CSS, Shadcn UI
Backend	Supabase (Postgres, Auth, Storage)
Payments	Stripe
Notifications	Supabase Realtime / Triggers

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## 7. Out of Scope (Current Phase)

- Mobile application
  - Real-time chat
  - AI legal advice
  - Public marketplace
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## **8. Success Metrics**

- Time-to-first-case < 24 hours
  - Client document upload success rate > 95%
  - Zero cross-firm data leakage
  - Admin task completion without support
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## **9. Future Roadmap (High Level)**

- Messaging & collaboration
  - AI-powered case summaries
  - Advanced reporting & analytics
  - Mobile client app
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**Status:** Canonical PRD – Ready for Jira decomposition & execution