

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.

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

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

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