

CaseBridge — Internal Operations PRD

Scope: Internal Platform (Admin Manager + Case Manager + Associate Lawyer)

Relationship to Client Phase: This PRD governs all non-client users and integrates with the Client Phase already defined.

Status: Canonical PRD for Internal Roles

1. Product Purpose

The **Internal Operations Platform** of CaseBridge enables law firms to: - Configure the firm workspace - Control access and permissions - Receive, manage, and execute client legal matters - Coordinate work between management and legal staff - Maintain audit-grade governance and accountability

This platform is designed to feel **authoritative, structured, and professional**, reflecting the seriousness of legal work.

2. Combined Role Model (Governance Clarification)

Although implemented within **one internal platform**, roles remain **logically distinct** via permissions.

2.1 Roles Overview

Role	Core Responsibility
Admin Manager	Firm ownership, governance, access control
Case Manager	Operational control of cases and workflows
Associate Lawyer	Execution of assigned legal work

All three roles authenticate into the **same internal app**, but see **different modules and permissions**.

3. Core Platform Principles

1. Single Internal Platform, Multi-Role
 2. Permission-driven UI (not role-based hard forks)
 3. Auditability of every sensitive action
 4. Clear ownership of every case and task
 5. Zero ambiguity in authority
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4. Authentication & Access Control

4.1 Authentication

- Email/password login
- Invitation-only onboarding (no public signup)
- Session persistence
- Inactivity timeout

4.2 Authorization Model

Permissions are derived from: - `role` - `firm_id` - `status` (active, suspended, deactivated)

4.3 Role Permissions Matrix (High-Level)

Capability	Admin	Case Manager	Associate
Firm Settings	✓	✗	✗
Invite Users	✓	✓	✗
Suspend Users	✓	✗	✗
Create Matters	✗	✓	✗
Assign Matters	✗	✓	✗
Update Case Status	✗	✓	✗
Edit Case Statement	✗	✓	✗
Upload Case Docs	✗	✓	✓
View Assigned Matters	✗	✗	✓

5. Admin Manager Module

5.1 Firm Setup & Profile

Capabilities - View and edit firm profile - Configure practice areas - View subscription & billing (internal)

5.2 User & Access Management

Features - Invite Case Managers and Associate Lawyers - View all firm users - Suspend / deactivate users - View access history

Audit Requirements - All access changes logged

5.3 System Audit Logs

Logged Events - User creation - Role assignment - Access revocation - Critical system changes

6. Case Manager Module

6.1 Case Intake & Review

Flow - Receive notification when client submits a matter - Review matter details - Set initial case status

6.2 Case Management

Capabilities - Create matters on behalf of clients - Assign Associate Lawyers - Update case status - Maintain case timeline

6.3 Document Review & Validation

Features - View all case documents - Preview & download - Mark documents as verified

6.4 Notifications

- Real-time alerts for new matters
 - Status change notifications
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7. Associate Lawyer Module

7.1 Onboarding & First Login

Flow - Accept invitation - Set password - Access limited dashboard

7.2 Associate Dashboard

Displays - Assigned matters - Pending tasks - Case deadlines

7.3 Case Execution

Capabilities - View assigned cases only - Upload documents - Update task progress

8. Shared Modules (Internal)

8.1 Case Timeline & Logs

- Every case action logged
 - Read-only timeline for Associates
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8.2 Notifications

- Notification bell
 - Unread counts
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9. Data Model (Internal Extensions)

profiles (extended)

- role (admin_manager, case_manager, associate_lawyer)
- status (active, suspended, deactivated)

case_logs

- case_id
- action
- performed_by
- timestamp

audit_logs

- admin_id
 - target_user_id
 - action
 - reason
 - created_at
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10. Security & Compliance

- Role verification on every request
 - Firm-level RLS on all tables
 - Immediate access revocation on suspension
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11. Out of Scope (This Phase)

- Client-facing features
- Messaging/chat
- AI legal advice

- Mobile app
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12. Success Metrics

- Admin can onboard firm without support
 - Case Managers process new matters < 24hrs
 - Zero unauthorized access incidents
 - Complete audit trail for all actions
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This PRD is the canonical specification for all INTERNAL CaseBridge roles.