

LEGACY CRM CARDS - OCTOBER 31, 2026

Five checks before you migrate.

A working replacement card is only part of the job.

Confirm the card type, source owner, behavior, tests and final view change.

For app maintainers and agencies. Save this checklist for your migration review.

CHECKS 1 + 2

Confirm the card. Find the owner.

01 Identify the actual card surface.

The sunset concerns legacy CRM cards. An API integration alone does not establish that a card migration is needed.

02 Locate the source and maintainer.

Our recommendation: record the app model, card definitions, backend owner and who can approve changes.

Do not share credentials or customer records in public discussions.

CHECK 3

Inventory what the card does.

Make the current behavior explicit before estimating the work.

- What data appears, and where does it come from?
- Which buttons or actions change something?
- Which record types and sidebars use the card?
- Who owns authentication, errors and backend dependencies?

These are review prompts, not a diagnosis of your app.

CHECK 4

Define acceptance tests first.

HubSpot recommends testing the replacement before migrating user views.

Suggested checks for your own test plan:

- Expected data and empty/error states
- Actions, permissions and backend responses
- Each supported record/sidebar location

Making a replacement available and moving existing views are separate steps.

CHECK 5

Treat the final view change carefully.

HubSpot says view migration cannot be stopped or reversed once initiated.

Our recommendation: finish the inventory and acceptance checks, then get an explicit go/no-go from the responsible owner.

Backups can support recovery planning. They do not reverse HubSpot's view-migration operation.



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