

Managing Category Levels in Shopify - Tutorial for Site Admins

Overview

This guide will help you understand and manage the category structure in your SAFE GEAR store. Categories in Shopify are called "Collections," and we use a hierarchical system with metafields to organize them into levels.

1. Understanding the Category Structure

Your store uses a 3-level hierarchy for organizing products:

Level 1 (Top Level Categories)

These are your main product categories that appear at the top of your navigation.

Examples from your store:

- Værdiskabte (Safes)
- Brandsikring (Fire Safety)
- Brandslukkere (Fire Extinguishers)

Level 2 (Subcategories)

These are subcategories that belong under a Level 1 category.

Example: Under "Værdiskabte" you might have:

- Different safe types
- Different security grades
- Different brands

Level 3 (Product Collections)

These are the actual product collections where individual products are assigned.

Example: Specific product series like "Serie 900" or "Fire Star"

2. How the Hierarchy Works with Metafields

Your store uses custom metafields to create the category relationships. Here are the key metafields:

Metafield Name	Metafield Key	What It Does	Used On
L1 Subcategory	l1_subcategory	Links Level 2 categories to their Level 1 parent	Level 1 collections
Collection List	collection_list	Lists featured or highlighted subcollections	Level 1 or Level 2 collections
Collection Level	collection_level	Identifies which level a collection belongs to	Any collection

3. How to View and Edit Category Hierarchy

Step 1: Navigate to Collections

1. From your Shopify admin, go to **Products** → **Collections**
2. Find the collection you want to edit
3. Click on the collection name to open it

Step 2: Scroll to Metafields Section

1. Scroll down past the description and image sections
2. Look for the **Metafields** section (usually near the bottom)
3. You'll see the custom fields we use for hierarchy

Step 3: Understanding What You See

For a Level 1 Category (like "Værdiskabte"):

- **L1 Subcategory:** Contains a list of all Level 2 categories that belong under it
- **Collection List:** May contain featured collections to highlight

For a Level 2 Category:

- May have its own subcollections listed
- Should be referenced in a Level 1 category's "L1 Subcategory" field

4. How to Move Categories

Example: Moving "Safety Signs" under "Fire Safety"

Step-by-Step:

1. Open the Level 1 category (Fire Safety / Brandsikring)

- Go to Products → Collections
- Click on "Brandsikring"

2. Find the L1 Subcategory metafield

- Scroll to the Metafields section
- Look for "L1 Subcategory" field

3. Add the Safety Signs collection

- Click in the "L1 Subcategory" field
- Search for "Safety Signs" (or the Danish equivalent)
- Select it from the dropdown
- It will be added to the list

4. Save the collection

- Click the Save button at the top right

Result: Safety Signs is now a subcategory of Fire Safety!

5. How to Change Category Hierarchy

Making a Level 2 Category into a Level 1 Category:

1. Remove it from its parent's L1 Subcategory list

- Open the current parent collection
- Find the L1 Subcategory metafield
- Click the X next to the collection you want to remove
- Save

2. Update the collection itself (optional)

- Open the collection you're promoting
- Update the "Collection Level" metafield to "1" or "Level 1"
- Save

Making a Level 1 Category into a Level 2 Category:

1. Choose which Level 1 category it should belong under

- Open the new parent collection
- Add your collection to its "L1 Subcategory" metafield
- Save

2. Update the collection level

- Open the collection you're demoting
- Update "Collection Level" metafield to "2" or "Level 2"
- Save

6. How to Fill Metafields Correctly

L1 Subcategory Field

- **Type:** List of collection references

How to fill:

1. Click in the field
2. Start typing the collection name
3. Select from the dropdown
4. Repeat to add multiple subcategories
5. Drag to reorder if needed

Example:

L1 Subcategory:

- Serie 900
- Fire Star
- Valø Fireproof
- Seguro

Collection List Field

- **Type:** List of collection references
- **Purpose:** Highlight specific collections to feature

How to fill:

- How to fill: Same as L1 Subcategory

Example:

Collection List:

- Serie 900 (featured)
- Euro V, VI, VII (new arrival)
- Topas Pro Deposit II (bestseller)

Collection Level Field

- **Type:** Text

How to fill:

- How to fill: Simply type "1", "2", or "3"

Example:

Collection Level:

1

7. How to Clean Up and Organize

Audit Your Category Structure

1. Create a spreadsheet with these columns:

- Collection Name
- Current Level
- Parent Category
- Number of Products
- Status (Active/Needs Review)

2. Review each collection:

- Does it have products? (If not, consider archiving)
- Is it in the right level?
- Is it linked to the correct parent?

3. Look for orphaned collections:

- Collections not linked to any parent
- Collections with no products
- Duplicate collections

Best Practices for Organization

DO:

- Use clear, descriptive names
- Keep hierarchy to 3 levels maximum
- Regularly review and remove empty collections
- Use consistent naming conventions
- Test navigation after making changes

DON'T:

- Create circular references (A links to B, B links to A)
- Leave collections without a level assigned
- Forget to save after making changes
- Delete collections that have products without reassigning them

8. Quick Reference Checklist

When creating a new Level 1 category:

- Create the collection
- Set "Collection Level" to "1"
- Add subcollections to "L1 Subcategory" field
- Add featured collections to "Collection List" (optional)
- Save

When creating a new Level 2 category:

- Create the collection
- Set "Collection Level" to "2"
- Open the parent Level 1 collection
- Add this collection to parent's "L1 Subcategory" field
- Save both collections

When moving a category:

- Remove from old parent's "L1 Subcategory" field
- Add to new parent's "L1 Subcategory" field
- Update "Collection Level" if changing levels
- Save all affected collections
- Test navigation on your storefront

9. Common Issues and Solutions

Problem: Collection doesn't appear in navigation

Solution: Check that it's added to a parent's "L1 Subcategory" field and that the parent is published

Problem: Can't find the metafield section

Solution: Scroll all the way to the bottom of the collection edit page, below SEO and Online Store sections

Problem: Changes don't appear on the website

Solution: Make sure you clicked Save, and clear your browser cache or check in an incognito window

Problem: Accidentally deleted a metafield value

Solution: Click Cancel (don't save), then reopen the collection to restore the previous values

Need Help?

If you're unsure about making changes:

1. Take a screenshot of the current metafield values before editing
2. Make changes to one collection at a time

3. Test on your storefront before making bulk changes

4. Keep a backup list of your category structure