

Product Add-ons Management Tutorial

Complete Guide for Site Administrators
SafeGear E-commerce Platform

Table of Contents

- Overview
- Key Metafields
- How It Works
- Step-by-Step Setup Guide
- Section Settings
- Common Configurations
- Troubleshooting
- Best Practices
- Quick Reference

1. Overview

The Product Add-ons section allows customers to select additional products (accessories, warranties, services, etc.) alongside the main product. This powerful feature enhances the shopping experience by suggesting relevant complementary items at the point of purchase.

This tutorial explains how to configure and control this section without programming knowledge.

2. Key Metafields That Control Add-ons

2.1 Main Product Metafield: `addon_products`

Location: Product metafields (on the main product)
Namespace: `custom.addon_products`
Type: List of product references
Purpose: Defines which products appear as add-ons for this main product

How to set it up:

- Go to your product in Shopify Admin
- Scroll to "Metafields" section
- Find or create `addon_products` metafield
- Add product references to the list (search and select products)
- Save the product

2.2 Add-on Product Metafield: `addon_type`

Location: Each add-on product's metafields (not the main product)
Namespace: `custom.addon_type`
Type: Single line text
Accepted Values: `"quantity"` - Shows quantity selector (+/- buttons)
`"yes_no"` - Shows only checkbox (no quantity selector)
Default: If not set, defaults to `"quantity"`

How to configure:

- Open the add-on product (not the main product)
- Find metafields section
- Set `addon_type` to either `"quantity"` or `"yes_no"`
- Save

3. How It Works

3.1 Display Logic Flow

```
Main Product Page | (has addon_products metafield) | Yes: Display
  "Complete Your Setup" section | For each product in addon_products list:
    Check addon_type metafield | [ Quantity ] | [ Yes/No ] | [ Checkbox Only ] | [ Show ]
      "quantity" | "yes_no" | [ Checkbox Only ] | [ Show ]
        "checkbox" | [ Show ] | [ Hide ]
          [+] [ - ] [ Save ]
```

3.2 Visual Comparison

Quantity Type	Yes/No Type
Best for: Physical items, accessories, multiple units	Best for: Services, warranties, single-unit items
Customer sees:	Customer sees:
<ul style="list-style-type: none">Product checkbox[+] Decrease button[!] Quantity display[+] Increase button	<ul style="list-style-type: none">Simple on/off selectionAlways quantity = 1
Examples: Extra shelves, locks, mounting kits	Examples: Installation service, warranty extension, delivery

4. Step-by-Step Setup Guide

Scenario 1: Adding Quantity-Based Add-ons

Example: Extra shelves, multiple warranties, mounting hardware

Step 1: Prepare the add-on product

- Create or edit the add-on product in Shopify Admin
- Scroll to Metafields section
- Set `addon_type` metafield = `"quantity"`
- Save the product

Step 2: Link to main product

- Open your main product (e.g., a safe)
- Scroll to Metafields section
- Edit `addon_products` metafield
- Click "Add product" and search for your add-on
- Select it from the dropdown
- Repeat for additional add-ons
- Save the main product

Result: Customers will see:

- Checkbox to select the add-on
- Plus/Minus buttons to adjust quantity (1-10)
- Price updates based on quantity selected
- Real-time total calculation in sticky cart

Scenario 2: Adding Simple Yes/No Add-ons

Example: Installation service, warranty extension, white glove delivery

Step 1: Prepare the add-on product

- Create or edit the add-on product in Shopify Admin
- Scroll to Metafields section
- Set `addon_type` metafield = `"yes_no"`
- Save the product

Step 2: Link to main product

- Open your main product (e.g., a safe)
- Scroll to Metafields section
- Edit `addon_products` metafield
- Add the add-on product to the list
- Save the main product

Result: Customers will see:

- Only a checkbox (no quantity controls)
- Quantity is always 1 when selected
- Simple on/off selection experience
- Cleaner interface for service-type products

5. Section Settings (Theme Customizer)

Navigation: Theme Customizer → Product Page → Product Add-ons Section

5.1 Available Settings

Setting	Purpose	Example Value
Section Title	Headline displayed above add-ons	"Complete Your Setup"
Section Description	Subheading text below title	"Enhance your security with add-ons"
Maximum Products to Show	Limit number of displayed add-ons	6 (shows first 6 products)
Cart Title	Heading for sticky cart sidebar	"Your Selection"
Main Product Label	Label for main product in cart	"Main Product"
Add-ons Label	Label for add-ons section in cart	"Add-ons"
Checkout Button Text	Text on final checkout button	"Proceed to Checkout"
Clear Button Text	Text on remove all add-ons button	"Clear Add-ons"

5.2 Customization Tips

- Keep titles short: "Complete Your Setup" is better than "Complete Your Setup With These Amazing Add-ons"
- Use action words: "Add to Cart" is more effective than "Purchase"
- Test mobile view: Ensure text fits on smaller screens
- Match brand voice: Use language consistent with your brand

6. Common Configurations

Configuration A: Accessories with Quantities

Use Case: Physical accessories that customers might want multiple units of

Examples: Shelves, locks, mounting hardware, drawer dividers

Setup:

- Set `addon_type` = `"quantity"` on each accessory product
- Add all accessories to main product's `addon_products` list
- Order them by importance (first = most important)

Customer Experience:

- Can select multiple quantities of each accessory
- Sees running total update in real-time
- Easy to add/remove quantities with +/- buttons

Pro Tip: This is the recommended configuration for most products. It gives customers the most flexibility while keeping the interface clean and intuitive.

7. Troubleshooting

Common Issues and Solutions

Problem: Add-ons section not showing at all

Solution:

- Check that main product has `addon_products` metafield
- Verify at least one product is added to the list
- Ensure the section is enabled in Theme Customizer
- Check that add-on products are active (not draft)

Problem: Quantity controls not appearing

Solution:

- Check add-on product has `addon_type` = `"quantity"`
- Or verify `addon_type` metafield is not set (defaults to quantity)
- Clear browser cache and refresh page

Problem: Can't adjust quantity (stuck at 1)

Solution:

- Add-on product likely has `addon_type` = `"yes_no"`
- Change metafield to `"quantity"` if you want quantity controls
- Save and refresh the product page

Problem: Too many add-ons displayed

Solution:

- Go to Theme Customizer → Product Add-ons Section
- Adjust "Maximum Products to Show" setting
- Recommended: 3-6 add-ons for best customer experience

Problem: Wrong add-ons showing

Solution:

- Check the `addon_products` list on main product
- Remove unwanted products from the list
- Add correct products
- Reorder by dragging (first = shows first)

Problem: Prices not updating correctly

Solution:

- Verify add-on products have correct prices set
- Check for any active discounts affecting prices
- Clear browser cache
- Test in incognito/private browsing mode

8. Best Practices

8.1 Product Organization

Organize by Priority

Add most important add-ons first in the list. They appear in the order you add them, so put high-value items at the top.

Example order:

- Extended warranty (high value service)
- Installation service (convenience)
- Extra shelf (most popular accessory)
- Mouting kit (commonly needed)
- Additional lock (security upgrade)

8.2 Product Naming

Use Clear Product Titles

Add-on names appear in the customer's cart and checkout. Make them descriptive and clear.

Good examples:

- ✓ "Extra Shelf - 5" x 11" x 14" DataSafe"
- ✓ "Professional Installation Service"
- ✓ "3-Year Extended Warranty"

Bad examples:

- ✗ "Shelf"
- ✗ "Service"
- ✗ "SKU-12345"

8.3 Pricing Strategy

Set Appropriate Prices

- Ensure add-on prices are accurate and up-to-date
- Use competitive pricing for accessories
- Price services to cover costs plus margin
- Consider bundled pricing for multiple add-ons

8.4 Customer Experience

Limit Total Add-ons

Recommended: 3-6 add-ons per product

Why?

- Too many options overwhelm customers
- Reduces decision paralysis
- Keeps page clean and scannable
- Focuses on most relevant items

If you have more than 6 potential add-ons, choose the most popular or profitable ones.

8.5 Testing

Test Both Types

Before launching, verify:

- Quantity add-ons show +/- controls correctly
- Yes/no add-ons show only checkbox
- Prices calculate correctly
- Cart updates in real-time
- Checkout includes all selected add-ons
- Mobile experience is smooth

8.6 Product Images

Use Quality Images

Each add-on product should have:

- High-resolution product image
- Clear view of the item
- Consistent background/lighting with main products
- Multiple angles if needed

Good images increase add-on conversion rates significantly.

9. Quick Reference

9.1 Metafield Summary

```
Metafield Structure: [custom.addon_products] (on main product) | [—]
  Type: List of products | Purpose: Defines which products are add-ons
  List: [custom.addon_type] (on each add-on product) | Type: Single line text | —
    Values: | [Quantity] | [Yes/No] | [Checkbox Only] | [Show]
      "quantity" | "yes_no" | [Checkbox Only] | [Show]
```

9.2 Setup Checklist

Step	Action	Status
1	Create or identify add-on products	□
2	Set <code>addon_type</code> on each add-on product	□
3	Add add-ons to main product's <code>addon_products</code> list	□
4	Order add-ons by priority	□
5	Configure section settings in Theme Customizer	□
6	Test on desktop browser	□
7	Test on mobile device	□
8	Complete test purchase	□

9.3 Decision Tree

```
Should I use "quantity" or "yes_no"? Is it a physical product? Yes | No
  Yes: Use "quantity" for physical products | No: Use "yes_no"
  Quantity: Shelves, locks, batteries, cables • Yes/No: Warranty, Installation, delivery, setup
```

9.4 Support Contacts

Need Help?

Shopify Support: For metafield issues or general Shopify questions

Theme Support: For customization or display issues

Development Team: For custom functionality requests