Opening & Closing Procedure

SOP · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

An opening and closing procedure is the written sequence of checks and tasks staff complete at the start and end of every business day — disarming the alarm, walking the premises, setting up registers and systems, and securing everything again at close. It turns "how we open up" from something only long-tenured staff know into instructions anyone trusted with keys can follow.

Most operational problems surface at the edges of the day: unlocked doors, unset alarms, equipment left running overnight, register drawers that do not balance. A written open and close routine catches these before they cost money — and the first and last person in the building is usually the person with the least supervision and the most exposure.

This template gives you a complete, ready-to-edit procedure for any storefront business: opening checks, closing checks, keyholder and alarm rules, arrangements for staff who open or close alone, and the daily records that prove the routine is being followed. If you run a restaurant, pair it with the restaurant-specific opening and closing checklist, which adds the food safety checks.

Purpose and scope

This procedure sets out how [Your company] opens and closes [location] each business day. It applies to every keyholder and to all staff scheduled on opening or closing shifts.

The aim is simple: the business opens on time, safe and ready to trade, and closes secure, clean, and counted — every day, regardless of who is on shift.

Roles and responsibilities

- Manager on duty / keyholder ([names]): holds keys and alarm codes, completes or supervises the opening and closing checklists, and signs them off.
- Opening staff: complete the setup tasks for their area before doors open at [time].
- Closing staff: complete the shutdown tasks for their area; nobody leaves until the manager on duty confirms the close is complete.
- General manager ([name/role]): reviews completed checklists weekly, controls who holds keys and codes, and owns this procedure.

Opening procedure

1. Approach the building and check for signs of forced entry before unlocking. If anything looks wrong, do not enter — move to a safe distance and call [911 / alarm company / manager].
2. Unlock, enter, and disarm the alarm within [number] seconds using your personal code. Never share codes or write them down on site.
3. Walk the full premises: confirm all areas are empty, exit routes are unlocked and unobstructed, and there are no leaks, damage, or signs of pests.

4. Turn on lights, HVAC, and equipment in the order listed for your site: [equipment list and warm-up times].
5. Start up the POS, payment terminals, and [other systems]; confirm they are online before the first customer, and report any failure to [name/role] immediately.
6. Count each register float ([amount]) with a second person where possible and record it on the daily sheet.
7. Check the sales floor and entry: floors dry and clear, displays and signage set, restrooms clean and stocked.
8. Complete and sign the opening checklist for your area, then unlock the customer doors at [time] — not before the checklist is done.

Closing procedure

1. Check that all customers have left, including restrooms and [other areas], then lock the customer doors at [time].
2. Count out each register following the cash handling procedure and secure cash receipts and floats in the safe.
3. Shut down equipment in the order listed for your site and confirm [heat-producing equipment, machinery] is off, not idle.
4. Complete the cleaning and trash tasks on the closing checklist; take trash to [location] and lock the waste area — a propped back door is the classic closing-time security hole.
5. Do a final walk-through: windows shut, interior doors closed, faucets off, exit doors secure, nobody left in the building.
6. Set the alarm, exit within [number] seconds, lock the final door, and test it before leaving.
7. Record the close on the daily sheet: time, your name, and anything unusual to hand over to the opening team.

Keys, codes, and alarms

Keys and alarm codes are issued only to named keyholders, recorded in the key register at [location], and recovered on their last day. Each keyholder has their own alarm code where the system allows it, and codes are changed whenever a keyholder leaves or a code may have been compromised.

The alarm company, permit details [if your locality requires an alarm permit], and response instructions are recorded at [location]. False alarms are logged and reviewed — repeat false alarms cost money under many local ordinances and train everyone to ignore the system.

Opening and closing alone

Where a member of staff opens or closes alone, they follow the lone-working arrangements: send a check-in message to [name/number] on arrival and at final lock-up, keep doors locked until the opening checklist reaches [step], and never enter after signs of a break-in. If confronted, they should comply and get to safety — no property is worth an injury — then call 911.

If something goes wrong

- Alarm will not set or sounds in error: call [alarm company/number], stay until it is resolved or handed over, and log it on the daily sheet.
- Signs of break-in on arrival: do not enter; call 911, then [manager], from a safe distance.
- Equipment or system failure at open: report to [name/role] immediately and follow the [system] contingency — do not open the affected area until it is cleared.
- Float or closing-count discrepancy: follow the cash handling procedure and record it before leaving.

Records and review

Completed opening and closing checklists and daily sheets are kept at [system/location] for [period]. They are the evidence that the routine happened — and the first thing to check when investigating a loss, an alarm activation, or an insurance claim.

This procedure is reviewed [frequency, e.g. annually], after any security incident, and whenever trading hours, layout, or equipment change. Owner: [name/role]. Next review due: [date].

How to use this template

1. Walk the open and the close with your most experienced manager and write down what they actually do — then reconcile it with this template and keep the better version.
2. Put equipment and systems in the exact order they should be switched on and off; order matters more than people expect.
3. Name every current keyholder in the roles section and check the key register matches reality before publishing.
4. Check your local alarm ordinance and your insurance policy conditions, and fold anything they require into the security sections.
5. Split the checklists by area if more than two people open or close, so each person signs for their own tasks.
6. Trial the finished procedure for a week and time it — if opening takes longer than the paid setup time, fix the schedule, not the checklist.

Official guidance

› OSHA — Workplace violence

› Ready.gov — Business preparedness