

Opening & Closing Procedure

SOP · UK · Updated 2026-07-11 · 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 trading day — disarming the alarm, checking the premises, setting up tills and equipment, and securing everything again at close. It turns "how we open up" from something only long-serving staff know into instructions anyone trusted with keys can follow.

Most operational problems surface at the edges of the day: unlocked doors, unset alarms, fridges left off overnight, floats that don't balance. A written open and close routine catches these before they cost money, and it is the first document a new duty manager actually needs.

This template gives you a complete, ready-to-edit procedure: opening checks, closing checks, keyholder and alarm rules, lone-working arrangements, and the daily records that prove the routine is being followed.

Purpose and scope

This procedure sets out how [Your company] opens and closes [site name] each trading day. It applies to every keyholder and to all staff rostered on opening or closing shifts.

The aim is simple: the premises open on time, safe and ready to trade, and close secure, clean, and cashed up — every day, regardless of who is on shift.

Roles and responsibilities

- Duty manager / 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 duty manager 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 premises and check for signs of forced entry before unlocking. If anything looks wrong, do not enter — move to a safe distance and call [police / keyholding 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: check all areas are empty, fire exits are unlocked and unobstructed, and there are no leaks, damage, or signs of pests.
4. Turn on lights, heating or ventilation, and equipment in the order listed for your site: [equipment list and warm-up times].
- 5.

Check and record fridge and freezer temperatures [if applicable] and report any unit out of range to [name/role] before using it.

6. Count the till float ([amount]) with a second person where possible and record it on the daily sheet.
7. 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 all customers have left, including toilets and [other areas], then lock the customer doors at [time].
2. Cash up each till following the cash handling procedure and store takings and floats in the safe.
3. Shut down equipment in the order listed for your site and confirm [fryers, hobs, heaters, machinery] are off, not just idle.
4. Complete the cleaning and waste tasks on the closing checklist; take waste to [location] and lock the waste area.
5. Do a final walk-through: windows shut, internal doors closed, fire exits secure, taps off, nobody left on the premises.
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.

Security and lone working

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

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 on final lock-up, and never challenge intruders — leave and call 999.

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 the police, then [manager], from a safe distance.
- Equipment failure at open: report to [name/role] immediately and follow the [equipment] contingency — do not open the affected area until it is cleared.
- Till float or cash-up discrepancy: follow the cash handling procedure and record it before leaving.

Records and review

Completed opening and closing checklists and daily sheets are kept in [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 duty manager and write down what they actually do — then reconcile it with this template.
2. Put equipment in the exact order it should be switched on and off; order matters for [fryers, coffee machines, tills] more than people expect.
3. Name every current keyholder in the roles section and check the key register matches reality before publishing.
4. Split the checklists by area if more than two people open or close, so each person signs for their own tasks.
5. Trial the finished procedure for a week and time it — if opening takes longer than the paid setup time, fix the roster, not the checklist.

Official guidance

- › [HSE — Protecting lone workers](#)

This template is provided in good faith and for general information — it is not legal advice. Adapt it to your organisation and, where your sector carries specific legal requirements, have the finished document reviewed by a qualified adviser. The live version at <https://trainedteam.com/templates/opening-closing-procedure> is kept current; this file is a snapshot.