Residential Logbook Association

Buying and Selling Residential Property:

Digital Property Logbooks

Non-Statutory Guidance for Property Professionals

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1. About this guidance

This non-statutory guidance is issued by the Residential Logbook Association (RLBA) to support the comprehensive integration of the Government's Home Buying and Selling Reform Roadmap for residential property. It establishes administrative and operational frameworks for Property Professionals operating within England and Wales using Digital Property Logbooks, the National Logbook Register (NLR), Digital Sales Packs, and property data lifecycle management. It does not apply to commercial property.

The Roadmap commits the Government to making Digital Property Logbooks and Digital Sales Packs a standard feature of all property transactions. Property professionals are strongly encouraged by Government to adopt them now, ahead of legislation.

While this guidance does not carry independent legislative force, compliance is strongly recommended. Adherence ensures market transparency, mitigates consumer risk, satisfies modern due diligence benchmarks, dramatically reduces transaction friction, and demonstrates to regulators compliance with the Government's Roadmap.

2. Definitions and Interpretation

This guidance is written for **Property Professionals**, including but not limited to:

- estate agents and property agents marketing residential property;
- solicitors, licensed conveyancers and other conveyancing practitioners acting for sellers and buyers;
- mortgage lenders and their panel conveyancers;
- developers, housebuilders, registered providers and housing associations selling new-build homes or homes under shared ownership and other affordable home-ownership schemes; and
- providers of logbooks, Material Information and Sales Packs, and the bodies that regulate them.

Property professionals should interpret the key terms used in the Government's Home Buying and Selling Reform Roadmap, and in this guidance, according to the definitions below.

Digital Property Logbook (a 'Logbook') - A secure, permanent digital record specific to a singular residential address. It serves as a continuous lifetime repository for a property's structural, regulatory, legal, and operational documentation, remaining intrinsically linked to the physical asset through successive changes of ownership.

A 'Verified' Logbook - A Logbook provided by an RLBA Registered Provider whose property details, owner ID and ownership status have been verified by a professional body certified to AML/KYC standards (with the commensurate professional indemnity). A Logbook can only be listed on the National Logbook Register (see below) if it has been verified.

National Logbook Register (NLR) - The central regulatory index and verification database maintained by the RLBA to map all existing Digital Property Logbooks against their corresponding HM Land Registry (HMLR) title numbers. A property appearing on the NLR confirms that a Verified Logbook and/or a Verified Sales Pack is in place for the property, and identifies the RLBA Registered Provider which holds it.

Residential Logbook Association (RLBA) - An UK industry standards and accreditation body for Digital Property Logbook and Digital Sales Pack providers. The RLBA regulates its member providers (including requirements for professional indemnity and cyber insurance, data protection, data provenance, interoperability & security) and operates the National Logbook Register.

RLBA Registered Provider - A Digital Property Logbook or Digital Sales Pack provider that is a member of the RLBA. A list of RLBA Registered Providers is published by the RLBA

Digital Sales Pack - A distinct, transaction-specific compilation of the legal and upfront information required to facilitate the marketing and conveyancing phase of a sale, as set out in Annex B of the Government's Roadmap. It is a snapshot of data at a specific moment, transactional and static. A Digital Sales Pack is one of a range of output packs which can be generated and delivered by an RLBA Registered Provider. A Digital Sales Pack produced by an RLBA Registered Provider from conveyancing grade sources and registered on the NLR is a **Verified Sales Pack**.

Distinction between a Logbook and a Digital Sales Pack

Feature	Digital Property Logbook	Digital Sales Pack
Summary	A lifetime digital companion for the property with live data.	A snapshot in time to support a transaction. Data is fixed.
Primary Purpose	Lifetime record and repository for the property asset.	Upfront information package to execute a specific sales transaction.
Lifecycle Scope	Permanent. Extends indefinitely and transfers to each new owner.	Temporary. Concludes upon the final completion of the active transaction.
Content Focus	Broad operational records (warranties, utilities, historical structural files), with always-on access to conveyancing grade data feeds.	Legal and upfront information as set out in Annex B of the Roadmap (title documents, searches, property information forms).

Note: A Digital Property Logbook can output a Digital Sales Pack either as PDF documents and/or as structured data.

3. Guidance for Professionals Representing the Seller

Initial Checks and the National Logbook Register

Upon accepting a new commission or formal instruction to act on behalf of a Seller, the instructed estate agent and/or the conveyancer should consult the National Logbook Register (NLR). This check identifies whether a Verified Logbook and/or a Verified Sales Pack already exists for the property.

A. Process For When A Logbook and/or Sales Pack Is On The NLR

Because records indexed on the NLR are verified by a recognised property professional at the point of setup, they establish a secure framework. If a Logbook and/or Sales Pack is located, professionals should act as follows:

- **Digital Sales Pack Status:** Review the NLR to ascertain whether a valid Digital Sales Pack has already been generated and is accessible via the Logbook.
- **Obtaining the Digital Sales Pack:** With the seller's authority, contact the RLBA Registered Provider shown on the NLR to obtain the Digital Sales Pack.
- **Asset Transfer Protocol:** Formally advise the client that the Logbook is a digital asset which accompanies the property and should pass to the buyer on completion. The transfer of the Logbook should be confirmed in pre-contract correspondence between the conveyancers.
- **Boundary of Professional Liability:** The seller's conveyancer is not required to inspect, audit or maintain the Logbook. Their role is limited to accessing the Digital Sales Pack and the conveyancing documents and data it contains.

B. Process For When no NLR Entry Exists

If the NLR returns no records for the Property Professionals should apply the following criteria:

- **Digital Sales Pack Provision:** The agent or conveyancer should ensure that a Digital Sales Pack is prepared for the seller. These can be procured from a variety of authorized channels including an RLBA Registered Provider or the seller's conveyancing firm – see separate guidance note.
- **Logbook Creation:** Whilst there is no mandatory requirement for Property Professionals to create a new Logbook solely to commence active market listing it can be set up as a vehicle to deliver a Digital Sales Pack.
- **Complex Homes:** A Logbook is of particular value for selling and handing over a home with complex systems or technology, particularly those with online accounts, passwords, warranties, contracts or specialist information which a Logbook enables to be handed over securely. Professional may consider recommending a Seller compile a Logbook if these are present to manage buyer queries and to smooth the handover.

The Property Professional should use their own discretion to decide if the property is sufficiently complex to warrant a full Logbook over a Digital Sales Pack. See overleaf for a definition of a complex home.

Definition of a ‘Complex Home’:

Any residential property incorporating features which necessitate a managed handover to ensure safe, legal, and operational continuity for the new owner. At the professional’s discretion, this includes but is not limited to properties with:

- solar panel installations and corresponding Feed-in Tariffs (FiTs)
- air or ground-source heat pumps and battery storage;
- dedicated Electric Vehicle (EV) charging hardware;
- centralised smart home networks (e.g. integrated automated lighting, climate control or security systems)

In addition matters flagged through Material Information may also deem the property to be a ‘Complex Home’, including but not limited to leasehold or shared ownership tenure, restrictions and covenants, listed building or conservation area status, building safety matters, and private water, drainage or heating arrangements.

4. Guidance for Professionals Representing the Buyer

The MHCLG Roadmap seeks to ensure that every buyer walks away from a transaction with a Digital Property Logbook. A conveyancer representing a buyer should consult the National Logbook Register (NLR) and follow one of two pathways based on the NLR status:

A. Process For When A Logbook and/or Sales Pack Is On The NLR

- **Client Notification:** The conveyancer should promptly inform their client of the existence of the Verified Logbook and/or Verified Sales Pack.
- **Requesting the Digital Sales Pack:** The conveyancer should request the Digital Sales Pack from the Seller’s conveyancer.
- **Buyer Access to Logbook:** A Buyer may request to view the contents of the Logbook via the Estate Agent. The Estate Agent must ensure that access to the Logbook is handed over to the new owner on completion (at the point when physical keys are handed over).
- **Boundary of Professional Liability:** The Buyer’s conveyancer is not required to inspect, audit or maintain the Logbook. Their role is limited to accessing the Digital Sales Pack and the conveyancing documents and data it contains. The Logbook itself passes to the buyer on completion.

B. Process For When no NLR Entry Exists

- **Logbook Creation:** At the end of the transaction, the buyer’s conveyancer should advise the client to set up a Verified Logbook, so that the documents gathered during the transaction are preserved for the buyer and all future transactions. A conveyancer can enable this via an RLBA member Logbook company.
- **RLBA Registered Providers:** Verified Logbooks can be set up with any RLBA Registered Provider, either manually or via API integration with the conveyancer’s case management system.

5. Document and Data Transfer Protocol upon Completion

Irrespective of whether the property utilised an existing Logbook or a new Logbook is created under Pathway B, the buyer's conveyancer should ensure that the key documents of the transaction are preserved. Upon Completion, the following documents, where available (aligned with Annex B of the Government's Roadmap), should be uploaded to the Logbook manually or via API:

- **Tenure, Property Type and Council Tax Band:** Confirmation of tenure, property type and the current Council Tax band.
- **Energy Performance Certificate (EPC):** The current EPC, where not already supplied to the Logbook by data feed.
- **HM Land Registry (HMLR) Title Documentation:** Official copies of the Register of Title and Title Plan, and any relevant deeds or covenants. RLBA Registered Provider may update these from HMLR once the buyer's registration has completed.
- **Leasehold and Freehold Estate Terms:** The lease and management information, or estate management documentation for freehold estates, where applicable.
- **Building Safety Information:** Any building safety information supplied with the sale.
- **Official Searches:** Official local authority, drainage and water, and environmental search results together with any locality searhes.
- **Executed Vendor Questionnaires (TA Forms):** All property information forms completed and signed by the seller (TA6, TA7 where applicable, and TA10), with supporting documents such as planning permissions, building regulation approvals and guarantees.
- **Property Condition Report:** The property condition assessment report prepared for the sale, where obtained.
- **Accessibility Information and Floor Plan:** Details of any accessibility features or adaptations, and the floor plan used to market the property.
- **Other:** Any other document relating to the transaction which the conveyancer considers may assist future transactions (for example, a copy of a conveyancing indemnity insurance policy put in place to rectify a title defect).

Ensuring this information is anchored directly within the Logbook on completion secures the integrity of the property's digital history, directly safeguarding the buyer's asset and laying the foundation for future friction-free transactions.

Annex A – Reasons To Set Up A Logbook

The following text has been suggested by RLBA members as pointers to why both consumers and industry professionals should be given Logbooks. It is the cumulative experience to date of Logbook companies selling into the Estate Agent and Conveyancer market.

A. Reasons for Clients to Be Given a Logbook:

A 'document problem' solved – A Logbook immediately files all key documents created or obtained through a transaction so they are findable and ready to use the next time the Buyer wants to remortgage or sell.

Real Time data feeds/alerts – A Logbook offers a Buyer continually updated information on their property from official sources (like HMLR). Depending on the provider, this can also include alerts and notifications.

Preparing Owners for the next sale – An RLBA verified Logbook can create a conveyancer-grade Digital Sales Pack in an instant from the data it has accumulated.

Building Property Value with their Data – Based on experience in other markets, in the emerging digital property market, homes with full and verifiable construction and maintenance records will be seen as more valuable than those without.

Future proofing their home - The data and functionality available to property owners to run and maintain their homes will continue to increase. An RLBA member Logbook will continue to evolve as more capability become possible. Logbooks are a digital companion for the life of a home.

B. Reasons for Agents & Conveyancers To Set Up Logbook:

Logbook Registration Fee – a Logbook is sold as a disbursement and can increase the fee available for each transaction.

Post Completion Efficiency - handing over a completed Logbook will reduce post-completion queries and costly interactions with recent clients.

Ongoing Post Completion Client Relationship – providing a Logbook should provide conveyancers with a platform to create an ongoing client relationship enabling more cross-sales and referrals and, in the long term, improved client retention rates.

Logbooks offer conveyancers a new way of working with clients- 'partners through the life of property ownership'