

ULI Matching Sandbox

The goal of this document is to provide documentation for potential matching methods that can be used for finding existing licensees.

Current Matching Algorithm

- 1) If NRDS is present, try matching on the given NRDS number and then validating against First Name or Nickname + Last Name (exact match).
- 2) Otherwise if License information is present, try and match the license info with First Name or Nickname and Last Name.
- 3) Match on NRDS or License information with First Name or Nickname and Last Name where Last Name has a space or hyphen where the above matches (1 & 2) didn't return a match. Matching the right or left segments of the Last Name.
- 4) Additional Heuristics
 - a) First Name or Nickname + Last Name
 - b) First Name or Nickname + Last Name segment
 - c) Fuzzy Name matching (edit distance)
 - d) Add Brokerage/Company name
- 5) Machine Learning?

Notes:

- Request NRDS ID on MLS application
- Request additional license information on Association or MLS application
- Engage Assoc management system (AMS) and MLS system vendors