

## **MeridianLink Unveils New Wave of Platform Enhancements to Drive Growth, Efficiency, and Customer Experience Across Lending Lifecycle**

*Latest innovations advance AI-powered automation, improve consumer experience and optimize end-to-end workflow for community financial institutions*

**IRVINE, Calif. — May 12, 2026** — [MeridianLink, Inc.](#), a leading provider of digital lending, account opening, and data-driven decisioning solutions, today announced a comprehensive set of platform enhancements designed to help community banks and credit unions grow faster, scale efficiently, and better serve their customers.

Every loan and new account has a path to approval but navigating that path can be complex for financial institutions. Manual processes, fragmented data, and limited visibility often slow progress and create unnecessary friction for both consumers and staff. MeridianLink’s newest enhancements address these challenges head-on with AI-powered workflows, smarter automation, and improved insight across the entire consumer journey.

“Community financial institutions are looking to build and grow relationships with consumers through more personalized experiences while automating back-office workflows to improve operational efficiency,” said Troy Coggiola, Chief Product and Strategy Officer at MeridianLink. “Our latest enhancements are purpose-built to help our customers reduce friction, automate complex processes, leverage the power of AI, and unlock new growth opportunities while strengthening customer relationships. In addition, we’re making it easier for our customers to connect, collaborate and shape our future innovation.”

### **Introducing MeridianLink Intelligence: AI Embedded Into the Flow of Work**

Headlining this release is **MeridianLink® Intelligence**, the embedded AI offering built within the MeridianLink® One platform.

Nicknamed “Millie,” MeridianLink Intelligence deploys role-based AI agents inside MeridianLink One to streamline workflows, increase application to funding speed, and enhance customer and employee experiences. The first agent, Doc Agent for MeridianLink® Mortgage, was previewed for an audience of 1,400 at the MeridianLink LIVE user conference, with general availability planned for the fourth quarter of 2026. Doc Agent for MeridianLink® Consumer will follow in early 2027. This marks the first step in developing a suite of task-specific agents designed to automate and optimize work across every stage of lending.

The first agent, Doc Agent for MeridianLink Mortgage, transforms document workflows—one of the most manual, error-prone areas in lending.

Doc Agent:

- Converts underwriting conditions into clear, borrower-ready requests
- Reviews borrower-supplied documents, ensuring completeness, currency and relevance
- Extracts structured data from documents for one-click updates to the application

By eliminating repetitive manual steps, Doc Agent reduces cycle times, improves accuracy, and keeps applications moving forward without bottlenecks.

## **New Resource Center Enhances Support and Collaboration**

MeridianLink also introduced its newly reimagined **Customer Resource Center** (formerly the Support Portal), a centralized hub for support, self-service, and product collaboration.

The Resource Center enables users to:

- Access knowledge articles and self-service tools
- Submit and track support cases
- Engage with live support via chat
- Share and vote on product enhancement ideas
- Monitor feature requests and updates

This evolution expands self-service capabilities while giving customers a stronger voice in shaping future innovation.

## **MeridianLink Access Enhancements Reduce Friction in Applications**

Enhancements to MeridianLink Access focus on improving both consumer and workforce experiences during application and account opening processes.

A key feature, **prefill**, verifies identity and automatically populates applicant data, reducing manual entry and accelerating completion times. This not only creates a seamless experience for consumers but also improves data accuracy, reduces operational workload, and strengthens fraud protection through verified information.

**Expanded omnichannel capabilities** allow applicants to start and resume applications across digital and in-branch channels without losing progress, helping reduce abandonment and increase completion rates.

Additional enhancements to the MeridianLink Access product provide increased automation for both applicants and users, including **automated zip code validation** to determine membership eligibility, **proactive disqualification notifications** for applicants using rule-based logic, and **automated consent documentation** that provides consolidated, auditable records that make it easier for customers to meet compliance requirements.

### **MeridianLink Mortgage: Back Office Enhancements**

Updates for MeridianLink Mortgage allow customers to increase productivity and make faster, more confident loan decisions.

Enhancements include:

- The ability to define and manage loan application templates
- Improved access to all borrower and team conversations, eliminating the need for multiple logins through the loan conversation log in the Originator Portal.
- Increased speed and accuracy of loan decisions by automatically saving application comparison data and reusing it when matching against electronic documents.

### **MeridianLink Insight and Engage: Turning Data Into Action**

New updates across MeridianLink Insight and MeridianLink Engage help community financial institutions move beyond static reporting to real-time, actionable intelligence.

Enhancements include:

- Share of Wallet automation, improving data connectivity and reducing manual effort
- Stronger integration between Insight and Engage for more targeted campaign execution
- Risk segment aggregate reporting in Engage, providing clearer visibility into campaign performance and ROI

Together, these capabilities empower teams to identify opportunities faster, execute more effective campaigns, and optimize performance with greater precision.

## **Clearing the Path to Yes**

Each enhancement in this release reflects a unified goal: removing friction across the path to approval. By connecting systems, streamlining workflows, and embedding intelligence into everyday processes, MeridianLink enables financial institutions to operate with greater speed, efficiency, and confidence.

To learn more about MeridianLink's latest product enhancements, click [here](#).

## **About MeridianLink**

MeridianLink's leading digital lending platform and suite of solutions help retail banks, credit unions, IMBs, and consumer reporting agencies grow, scale, and serve. Powered by smarter automation, built-in compliance, trusted AI and data, and the industry's most robust partner network, we connect consumers to a modern technology ecosystem. Our solutions across account opening, loan origination and optimization, digital mortgages, collections, and reporting accelerate processes, deliver personalized experiences, and foster lasting relationships. Together, we're making lending human.

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