

REVIEW DRAFT | NOT EXECUTED | VERSION 2026-09-26-D1

From Checkout To Approved Access

Status

Review draft for Cima Tax Pro, LLC., version 2026-09-26-D1. The full-refund rule below is approved for the prototype. Other commercial details must be completed in the final agreement before collecting live payments.

Demo Means No Charge

The current demonstration offers simulated payment only. No transfer is requested. A displayed price or recorded demo order does not authorize Cima to debit an account or create a software license.

Before A Real Payment

Read the exact package description, completed price/renewal schedule, customer agreement and activation conditions. Know the seller, the supplier and the services included. Optional bank products and specialist services require separate choices and terms.

Offline Payments

Cash App and Zelle, when verified and enabled, require manual confirmation of actual receipt in the business receiving account. Compare the destination and recipient display name with Cima's official instructions. Stop if they differ. Do not send twice because an order remains pending. A screenshot is not proof of receipt. Current placeholder destinations must not be used.

The Approval Sequence

Cima records the order; verifies actual funds; reviews credentials and filing arrangements; confirms the executed customer agreement and required provider permission; provisions the authorized software; and confirms activation. The customer desk communicates progress and any requested next step. A payment alone does not complete approval.

What Activation Means

Activation means Cima has confirmed the permitted access destination and provisioning for the purchased scope. The provider may deliver a separate sign-in or invitation. Access to a demo desk or free orientation does not count as paid software activation.

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Refunds And Clear Records

If Cima Cannot Activate

Cima will refund the enrollment payment in full if it cannot approve or provision the purchased package. No unagreed administrative deduction applies. Contact Rasheeda@cimatapro.com with your order number, not bank credentials or taxpayer documents.

Withdrawal And Post-Activation Requests

The final signed order must state voluntary cancellation, partial-service and post-activation refund rules before any live payment. This draft supplies no automatic nonrefundable fee and no invented processing deadline. Mandatory legal rights continue to apply.

Actual Repayment Versus A Status Change

For offline methods, Cima must make the actual repayment through the appropriate payment service and record it in WooCommerce. An order marked cancelled, a refund note, or a portal pause is not by itself proof that funds returned. Request written confirmation and a nonsensitive transaction reference.

Duplicate Or Incorrect Payments

Report a suspected duplicate or mismatch promptly with the order reference and payment date/amount. Cima should reconcile its receiving account before requesting another transfer. Never send passwords, full account numbers or a code used to authorize payment.

Access After Cancellation Or Refund

Cima may pause its website desk while the refund and remaining service scope are reviewed. Provider access must be handled through the provider separately. Follow lawful record-retention and transition duties; do not assume a refund erases existing confidentiality or licensing obligations.

Questions And Escalation

Start with Rasheeda@cimatapro.com or 832-298-8325. Keep a copy of the accepted terms and order record. This policy does not restrict lawful payment disputes, truthful reviews or complaints to regulators.