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INTRODUCTION

Geography is part of **Enterprise Foundation** and is shared by both **CRM** and **Financials**. Very often, this setup is not considered and does not form part of a minimal configuration checklist. As a consequence, missing out on this configuration or not doing it efficiently, introduces considerable limitations in your final solution design with quite a few implications across multiple configurations and usage.

WHAT IS GEOGRAPHY

Geography in Oracle Fusion Cloud is the **system's structured framework for storing and managing location-based information** - essentially how the system organizes and understands places around the world.

What Geography Includes

At its core, geography consists of hierarchical location data:

Countries - The top level, defining nations and their basic attributes (currency, language, tax regime)

States/Provinces - Administrative divisions within countries (California, Ontario, Bavaria, etc.)

Counties - Sub-state divisions where applicable (used heavily in US for tax purposes)

Cities/Towns - Municipality level data

Postal Codes - ZIP codes, postal codes, or equivalent identifiers

How It's Structured

Geography uses a **hierarchical model**: Country → State → County → City → Postal Code. This hierarchy allows the system to:



- Validate addresses when you enter them
- Automatically populate dependent fields (enter a ZIP code, and city/state auto-fill)
- Determine which rules and rates apply based on location
- Enable geographic reporting and analysis

Two Key Components

Geography Types - Define the structure and validation rules (what fields are required, formats, etc.)

Geography Hierarchies - The actual data organized in parent-child relationships (United States → California → Los Angeles County → Los Angeles → 90001)

Where is Geography Used in Fusion:

In the context of **Oracle Fusion Financials setup**, geography plays a foundational role in configuring your financial management system correctly. Here's how it impacts your implementation:

Legal Entity and Ledger Configuration

Geography setup directly influences your legal entity definitions. Each legal entity must be assigned a country, which then determines the legal reporting requirements, chart of accounts structure, and accounting calendars available. This country assignment affects everything from statutory reporting to intercompany transactions.

Your primary ledger is also tied to geographic considerations through the legal entities it serves. Multi-country implementations often require multiple ledgers or reporting currencies based on where legal entities operate.



Tax Configuration

Geography is the backbone of tax setup in Fusion Financials. The system uses geographic hierarchies to:

- Determine applicable tax regimes (VAT, GST, sales tax, etc.)
- Calculate tax rates based on transaction locations (ship-from, ship-to, bill-to addresses)
- Support tax reporting and compliance requirements by jurisdiction
- Enable location-based tax recovery and offset rules

For example, a transaction between a California supplier and a Texas customer will have different tax treatment than one within a single state, all driven by geography.

Intercompany and Transfer Pricing

Geographic locations help define intercompany relationships and transfer pricing rules. Transactions between legal entities in different countries may require specific accounting treatment, currency conversion, and documentation for tax authorities.

Bank Account and Payment Processing

Geography affects bank account setup, payment formats, and electronic payment methods. Different countries require different bank file formats (NACHA, SEPA, BACS, etc.), and the system uses geographic data to determine which formats and validation rules apply.

Compliance and Statutory Reporting

Geographic setup enables country-specific features like:

- Localization requirements (French GAAP, Indian GST, Brazilian fiscal books)
- Regulatory reporting formats
- Audit file requirements (SAF-T, SII, etc.)
- Withholding tax rules by jurisdiction



Chart of Accounts and Segment Values

While not directly part of geography setup, many organizations structure their account segments geographically (region, country, location segments) to enable financial reporting by geography. Your geography setup should align with these reporting dimensions.

Best Practices for Financial Setup

Start by mapping out your legal entity structure and their geographic locations, then ensure your geography reference data is complete and accurate before configuring ledgers and tax. Consider whether Oracle's delivered geography hierarchies meet your needs or if you need custom structures for specific reporting requirements.

Are you working on a specific geography-related challenge in your Financials implementation, such as multi-country tax setup or legal entity configuration?

For the purpose of understand the set-up, we will map and set-up a Use Case for Usage in the Context of Tax.

PROBLEM STATEMENT

Mauritius territory consists of several small islands. Tax logic on purchasing is relatively simple. If a taxable item is procured within the territory (Mauritius or any of its neighboring island like Mauritius, STD_Tax applies (Standard Tax of 15%)

Problem 1: If the supplier ships from or to Rodrigues, in EBS, the tax does not apply as the country is Rodrigues and the tax regime is configured for Mauritius.



Work Around 1A: A workaround would be to create as many regimes as islands. This introduces another problem whereby now I have multiple standard Taxes which complicate the eventual reporting and reconciliation.

Work Around 1B: Do not create Rodrigues as an island and use Rodrigues in an address line. This creates problems with posting and location based reports.

Work Around 1C: Manually add the taxes when it relates to Rodrigues. This introduces considerable human error and adds unnecessary additional review action on invoice validation / approval.

Problem 2: Lots of duplicate supplier addresses; the same city, Port Louis, is written differently and at times in different columns. Unclean data introduces further lack of control of supplier performance and management.

Problem 3: Taxes still apply in Mauritius even if supplier is in a tax free zone in Mauritius

Work Around 3A: Manually overwrite and set tax amount as zero. Fundamentally incorrect as reports will flag this transaction as tax applied with a value zero. Else delete the line. Or introduce a manual input factor to overwrite. Or don't create automatic rules. all taxes to be applied manually.

DESIRED SOLUTION

Ensure Geography Structure and Hierarchy are well designed to address the following:

- Introduce Islands at a level prior to Country
 - o Address Line 1, City, Island, Country
 - o Eg1 : Route Royale, Port Louis, Mauritius, Mauritius
 - o Eg2 : Route Nicolay Port Mathurin, Rodrigues, Mauritius
- Design City's as list of values. You can do same for other sections like Regions, etc...
- Introduce Tax Free Zone in the Structure



HOW THIS ADDRESSES ALL THE DESIGN PROBLEMS

1. Single Regime as Country Level (Mauritius)
 2. Postal address breakdown clearly marks island and country
 3. Addresses are cleaned and enforced (and accessible at Supplier / Customer levels for example)
 4. Tax engine can use the Tax-Free zones with rules to either exempt, not calculate or alter tax codes
 5. Reporting for the country Regime is centralized
 6. Fusion Tax Reconciliation and Reporting become reliable (taxable transactions and calculated tax are properly identified)
 7. Automated tax configuration is now possible.
-

CONFIGURATION STEPS

1. Plan your Hierarchy Structure and based on the multiple purposes where it will be used. Dry run then on paper to ensure your subsequent design (ex, tax, or data cleaning) will function on top of this Structure.
2. Verify whether a provider, geographic data, or structure from similar countries exist.
3. Based on 2, load, copy or create your own structure.
4. Decide and configure how you will manage your structure (address cleaning, hierarchy, values as a list, instead of free text).
5. Test that your hierarchy is functional (create a supplier for example).
6. Draft data cleaning rules to publish to customer / data cleaning team.

SCREENSHOTS



Load Geography Data

For some countries, Geography data is available.

Search results for 'load geogr' showing a list of tasks. The 'Load Geography Interface Data' task is highlighted.

| Name | Type | Details |
|-------------------------------|------|---------|
| Load Geographies for Canada | Task | |
| Load Geographies for Mexico | Task | |
| Load Geographies for US | Task | |
| Load Geography Interface Data | Task | |

Load Geography Data

Configuration page for the 'Load Geographies for Canada' process set. The process set name is 'Load Geographies for Canada' and the description is 'Loads Canadian geography information into the Oracle data...'. Submission notes are set to 'Canada Geography'.

Process Set Name: Load Geographies for Canada
 Description: Loads Canadian geography information into the Oracle data...
 Submission Notes: Canada Geography

| Process Name | Path | Parent Process Set |
|---------------------|-------------------|-----------------------------|
| Validate Input P... | ValidateAndImport | Load Geographies for Canada |
| Run Geography ... | ProcessData | Load Geographies for Canada |

UNDERSTANDING AND CONFIGURING GEOGRAPHIES



ORACLE

Overview ?

Search Saved Search: Last hour

Search Results ?

View Flat List Hierarchy

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log

| Name | Process ID | Status | Scheduled Time | Submission Time |
|---|------------|-----------|--------------------|--------------------|
| Load Geographies for Canada | 1332508 | Succeeded | 25/01/26 14:45 TRT | 25/01/26 14:45 TRT |
| Run Geography Postprocessing | 1332511 | Succeeded | 25/01/26 14:45 TRT | 25/01/26 14:45 TRT |
| Run Geography Preprocessing | 1332510 | Succeeded | 25/01/26 14:45 TRT | 25/01/26 14:45 TRT |
| Validate Input Parameters and Import Canadian Geography Information | 1332509 | Succeeded | 25/01/26 14:45 TRT | 25/01/26 14:45 TRT |
| Load Geography Data | 1332502 | Succeeded | 25/01/26 14:41 TRT | 25/01/26 14:41 TRT |
| Refresh Access Control Data | 1332490 | Wait | 25/01/26 15:30 TRT | 25/01/26 14:31 TRT |

30°C Mostly sunny 3:46 PM 1/25/2026

Set-up → Financials → Enterprise Profile → Manage Geographies

ORACLE

Manage Geographies ? Done

Search Saved Search: All Countries

Country Name Starts with United States

Country Code Starts with

Search Reset Save...

Search Results

Actions View Format + Freeze Wrap

| Country Name | Country Code | Geocoding Defined | Address Cleansing Defined | Structure Defined | Hierarchy Defined | Validation Defined |
|--------------------------------------|--------------|-------------------|---------------------------|-------------------|-------------------|--------------------|
| United States | US | + | + | + | + | + |
| United States Minor Outlying Islands | UM | + | + | + | + | + |

Humid Now 3:38 PM 1/25/2026



Enable Geocoding

Enable Address Cleansing

Address Cleansing Level: United States

Validation Type Real Time Address Cleansing Options

* Real-Time Address Cleansing Level

Geography Structure

NOTE:

In some cases, structure is already provided by some Service Provider like Nokia / Loqate and you can load this data, eg:

The screenshot shows the Oracle Manage Geographies interface. The search criteria are set to 'Country Name Starts with South Africa'. The search results table is as follows:

| Country Name | Country Code | Geocoding Defined | Address Cleansing Defined | Structure Defined | Hierarchy Defined | Validation Defined |
|--------------|--------------|-------------------|---------------------------|-------------------|-------------------|--------------------|
| South Africa | ZA | + | + | ✓ | ✓ | + |

UNDERSTANDING AND CONFIGURING GEOGRAPHIES



| Name | Type | Code | Name Data Provider | Code Type | Code Data Provider |
|--------------|----------|------|--------------------|------------------|--------------------|
| South Africa | Country | ZA | User entered | ISO country code | User entered |
| Eastern Cape | Province | | GBG Loqate | | |
| Free State | Province | | GBG Loqate | | |
| Gauteng | Province | | GBG Loqate | | |

Check for your service provider

| Lookup Type | Meaning | Description | Module | Lookup Configuration Level | REST Access Secured |
|-----------------------|--------------------------------|---|-------------------------|----------------------------|---------------------|
| HZ_GEO_DATA_PROVID... | Geography Information Provider | Names of the source of geography informatic | Trading Community Model | User | Authenticated |

| Lookup Code | Display Sequence | Enabled | Start Date | End Date | Meaning | Description | Tag |
|-------------|------------------|-------------------------------------|------------|----------|--|---|-----|
| ORA_AVALARA | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | Avalara | | |
| LOQATE | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | GBG Loqate | | |
| GDT | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | Geographic Data Technology | | |
| NAVTEC | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | Nokia | | |
| ORA_HCM | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | Oracle Fusion Cloud Human Capital Manage | | |
| TIGER_DATA | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | TIGER data | Topologically Integrated Geographic Encodin | |
| TAXWARE | | <input checked="" type="checkbox"/> | 01/01/51 | dd/mm/yy | Taxware | | |

Alternatively, you can copy the structure from another existing Geography.



Manage Geography Structure: United States ?

Copy Country Structure From

Apply

Create

There is the option of loading Geography Data from the Interface as well

| | | | |
|---|---|---|---|
| Manage Geographies | 0 | 0 | ▼ |
| Load Geography Interface Data | 0 | 0 | ▼ |
| Run Geography Loader | 0 | 0 | ▼ |
| Run Maintain Geography Name Referencing | 0 | 0 | ▼ |
| Run Geocode Generation | 0 | 0 | ▼ |

Schedule New Process

Type Job Job Set

Name Load Geography Data ▼

Description Load geography data from the interface tables HZ_IMP_GEO_STRUCTURE_LEVELS and HZ_IMP_GEOGRAPHIES_T to geography tables.

OK

Cancel

This of course implies that the geography structure and geographies table have been prepopulated. (not shown in this case)

Finally you can also create your structure manually, and this is what we will demo.

Define the Geography Structure



ORACLE

Manage Geography Structure: Mauritius ?

Copy Country Structure From

Save Save and Close Cancel

Geography Structure

Add Geography Type Add

| Level | Geography Type | Subject to Grouping | Geography Exists at Level | Delete |
|-------------------------|----------------|---------------------|---------------------------|--------|
| No structure exists for | | | | |

21°C Partly cloudy

3:02 AM 2/17/2026

If the Geography Type does not exist, create and add. Else, select the geography type to add to your Structure

Manage Geography Structure: Mauritius ?

Copy Country Structure From

Geography Structure

Add Geography Type

| Level | Geography Type | Subject to Grouping | Geography Exists at Level | Delete |
|-------|----------------|-------------------------------------|---------------------------|--------------------------|
| 1 | Island | <input checked="" type="checkbox"/> | | <input type="checkbox"/> |
| 2 | District | <input checked="" type="checkbox"/> | | <input type="checkbox"/> |
| 3 | Zone | <input checked="" type="checkbox"/> | | <input type="checkbox"/> |



Search Results

Actions View Format + Freeze Wrap

| Country Name | Country Code | Geocoding Defined | Address Cleansing Defined | Structure Defined | Hierarchy Defined | Validation Defined |
|--------------|--------------|-------------------|---------------------------|-------------------|-------------------|--------------------|
| Mauritania | MR | ⊗ | ⊗ | ⊗ | ⊗ | ⊗ |
| Mauritius | MU | ⊗ | ⊗ | ⊗ | ⊗ | ⊗ |

Now that the Structure has been defined for this Geography (Mauritius):

Construct the Structure (load / create the values for each Structure)

Click on the '+' button to Create. Screenshot shows an Island being created. Provider is 'User Entered'.

ORACLE Create Island

Save Save and Close Cancel

General Information
Start Date: 17/02/26
Time Zone: [Dropdown]

Primary and Alternative Names

| Primary | Name | Data Provider | Language |
|---------|-----------|---------------|------------------|
| ✓ | Rodrigues | User entered | American English |

Primary and Alternative Codes

No geography codes found.



Manage Geography Hierarchy: Mauritius

Search

Geography Type: Equals

Name: Starts with

Code: Starts with

Geography Hierarchy

Actions View Format + ✎ ✕ 🔗 ⬆️ ?

| Name | Type | Code | Name Data Provider | Code Type | Code Data Provider |
|------------------|----------|------|--------------------|------------------|--------------------|
| ▲ Mauritius | Country | MU | User entered | ISO country code | User entered |
| ▶ Agalega | Island | | User entered | | |
| ▲ Mauritius Isle | Island | | User entered | | |
| ▶ Grand Port | District | | User entered | | |
| ▶ Pamplemousses | District | | User entered | | |
| ▲ Port Louis | District | | User entered | | |
| ▶ Plaine Verte | Zone | | User entered | | |
| ▶ Vallee Pitot | Zone | | User entered | | |
| ▲ Rodrigues Isle | Island | | User entered | | |
| ▲ Rodrigues | District | | User entered | | |
| ▶ Port Mathurin | Zone | | User entered | | |

PRE-REQUISITES / BEST PRACTICE

Solution Architecture: Scope of Geography usage within your design. Proper Design of the Structure and data cleaning. For example, imagine you fixed the districts as list of values, however data is fed for new suppliers from a third-party application where this is free text.

DOCUMENT EXCLUSIONS

- The document does not showcase how to load Geography Data
- The document does not showcase usage of Geography or Tax-Free Zones. This will be subject to a future paper.

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