

# Carbonite Safe Backup Pro Handbook - Windows



# Welcome to Carbonite

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# Important Things to Know

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## Reboot Your Computer at Regular Intervals

If you have workstations or servers that remain on or only rest during sleep mode for long periods of time, it is prudent to completely restart those systems weekly or at regular intervals to ensure that Carbonite's connection to our servers stays strong.

## Pay Attention to Your Storage Quota

Your account storage can be reviewed from within the web portal after logging in at [account.carbonite.com](https://account.carbonite.com). Staying up to date on the status of your storage quota allows you to plan ahead in case you need to purchase additional storage later or manage your backup to reduce its total size.

## Default Backup Selections

Carbonite Safe Pro will select *C:/Users* for backup by default if you opt for Carbonite's recommended backup selections during installation. Files and folders not located within the structure of this directory must be manually selected for backup.

Also, files larger than 1 TB in size are not selected automatically. They can be manually selected.

## Recover Mode

If it is determined that data is missing, or if you need to restore to another computer, your backup must be placed in *Recover Mode*, which will suspend backup operations and data retention, thus allowing you to restore. If you move your Carbonite subscription to a different computer and exit *Recover Mode* without performing a restore of your backup, any unrestored files will be removed from our servers within 30 days if they aren't otherwise present on the computer.

## Status Dots

Colored dots will be placed upon the icons of files and folders that have been included in your backup. A green dot indicates that a file or folder is backed up, while yellow indicates that backup is pending. A green or yellow donut will also appear on folders that are selected for backup if they contain files that are not selected for backup.

## Data Retention

If a backed up file goes missing or is deleted from your computer, Carbonite will retain a copy of it on our servers for up to **60 days** to give you a chance to restore it if needed. Unless your backup is in Frozen Mode, deleted and missing files will be removed from your backup **60 days** after they are deleted from the computer if they are not restored.

# Carbonite Features

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Carbonite offers a number of beneficial features to all of our customers, including:

- **Automatic and Continuous Cloud Backup**
  - Automatically back up your files to our servers and restore them any time you need.
- **Easy Controls, Simple Interface**
  - See the backup status of any file at a glance with our status dot system, and manually add/remove a file from your backup (if you choose to) with a few mouse clicks.
- **Unlimited Workstations**
  - Add as many computers to your account as you need: your charge is calculated based on total storage space.
- **Security, Privacy and Legal Compliance**
  - Files are transferred using 128-bit encryption, so no one else can see the data. The use of Carbonite also meets HIPAA, GLBA and FERPA standards.
- **File Versioning**
  - Carbonite remembers up to 12 versions of your data files, just in case you need to restore a file the way it was before your latest change.
- **Anytime Anywhere Access**
  - Access your backed-up files from any internet-connected computer and compatible iOS and Android mobile devices. Anytime, anywhere.
- **Integrated User / Administration System**
  - Invite users and other administrators, assign their devices, and view their backup activity; easily managing your whole company.
- **External Hard Drive and NAS Backup**
  - Back up files from external drives connected to a computer in addition to internal drives. Also, Administrators can back up files stored on NAS devices.
- **Free Support from Carbonite Customer Care**
  - [Call, chat, or email Carbonite Customer Care](#) for help with any Carbonite-related issues at no extra charge.
- **Free Valet Installation**
  - Set an appointment with a Customer Care agent for live help installing the Carbonite software and setting the proper options for your specific environment.

# Carbonite Advanced/Add-on Features

The following features are available for customers who purchase compatible plans or add-on packages:

- **Storage Packs**
  - Increase your total cloud storage allotment by 100 GB packs.
- **Windows File Server Support**
  - Add files located on file servers in your company to your online backup.
- **Physical and Virtual Server Backup**
  - Back up both physical and virtual servers.
- **Database and Live Application Backup**
  - Back up live databases and applications.
- **Hyper-V Environments**
  - Add Hyper-V virtual environments to your backup.
- **Remote Deploy and Management**
  - Install Carbonite to new devices remotely and apply custom backup profiles to each computer, ensuring that only the data types you want backed up are selected.
- **Courier Recovery Service**
  - If the normal restore process is blocked by a technical error that we can't work through, we can send you a protected external drive with all your data to get you back up and running.
- **Bare Metal Image Backup and Recovery**
  - Create a local backup of the entire operating system for recovering from catastrophic software failures.

# Setting Up and Installing

Setting up a trial with Carbonite is easy.

**Note:** Carbonite Safe Pro trials have all of the features of Carbonite Safe Ultimate, which is our highest tier Safe Pro offering. This allows you to try the full experience of Carbonite before committing to purchase.

1. On the [Carbonite.com](https://Carbonite.com) homepage, click **Get started** under the *Cloud backup for home & small business* section.

## Cloud backup for home & small business

From family photos to customer data, automatically protect everything in the cloud.

**Get started**

Compare our plans	ONE COMPUTER FROM \$6/ MONTH Select monthly	MULTIPLE COMPUTERS FROM \$24/ MONTH Select monthly	COMPUTERS + SERVERS FROM \$50/ MONTH Select monthly
Features			
Automatic cloud backup	✓	✓	✓
External Hard Drive(s) backup	✓	✓	✓
Award-winning support, 7 days/week	✓	✓	✓
Remote file access to computer files	✓	✓	✓
Encryption	128-bit	128-bit	128 or 256-bit
PDFs, iOs & HEMA support		✓	✓
Centralized management & admin controls		✓	✓
Image backup and bare metal restore			✓
Backup for databases & applications			✓
	Try it free	Try it free	Try it free

2. Under the column *Computers and Servers from \$50/ Month billed annually*, select **Try it free**.
3. Fill out the required information, then click **Submit**.

## Try Carbonite business backup **free for 30 days**

See for yourself how simple it is to protect your data. You have nothing to lose, and your entire business to save.

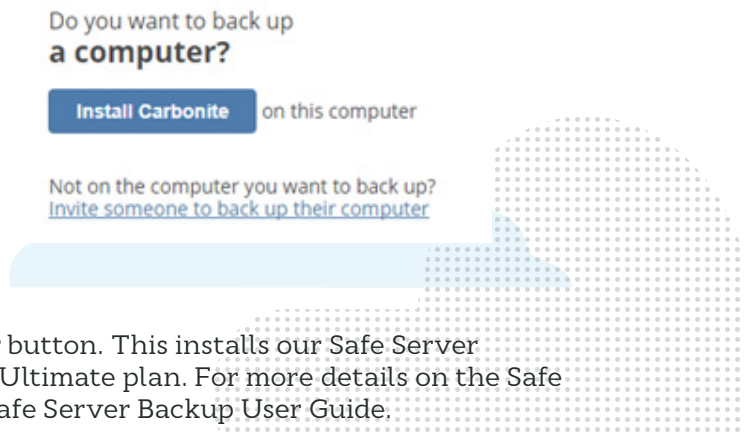
### Sign up for a free trial

First name:	Last name:
<input type="text"/>	<input type="text"/>
Company name:	
<input type="text"/>	
Phone:	
<input type="text"/>	
Email:	
<input type="text"/>	
<input type="button" value="Next"/>	

# Starting a Trial

That's it. Your trial account is created, and you'll see your account dashboard. You will automatically be added to your account as an Administrator. To install Carbonite:

1. Click **Install Carbonite**.



- You will also see an *Install Carbonite on this server* button. This installs our Safe Server Backup software and is part of our Carbonite Safe Ultimate plan. For more details on the Safe Server Backup product, please see the Carbonite Safe Server Backup User Guide.



2. Next, click **Download Now**.

The installer file will begin downloading. Run the file to install Carbonite and begin backing up your system.

You can use the software completely free for 30 days with no catch. If you decide Carbonite is not for you, just uninstall the software. Your trial account will expire and eventually delete itself from our servers.

If you do like Carbonite, you can convert your trial account to a paid subscription and continue your backup normally.

## Installing Carbonite for the First Time

You will get to configure the initial settings of your Carbonite software while installing Carbonite for the first time. To install Carbonite, run the Carbonite installer file that downloaded after starting your trial or paid subscription.

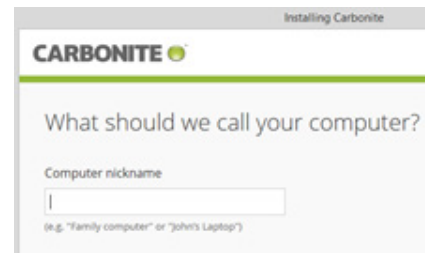
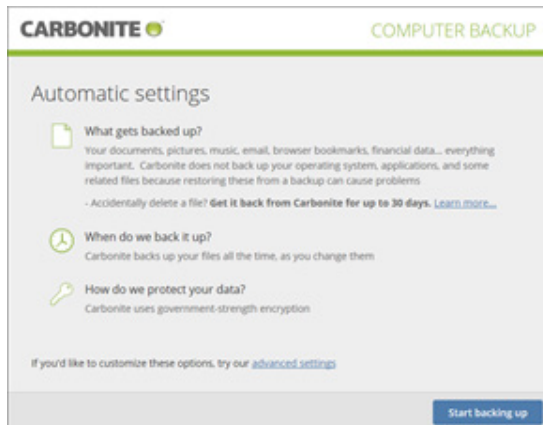
- You can always download the installer file again for an existing account by logging into [account.carbonite.com](https://account.carbonite.com) and clicking **Install Carbonite**.

1. First, click **I agree** in the *Terms of Service* window.

- A progress bar appears on the screen as the software installs. Allow this to complete.
- After the progress bar fills, the window will disappear and a new window appears, displaying statuses while Carbonite connects to our servers and establishes your backup.



2. Assign a nickname to this subscription, then click **Next >>**.



3. You'll choose between *Automatic* and *Advanced* backup settings next. For *Automatic*, click **Start Backing Up**. For *Advanced*, click the **Advanced settings** link.

**Automatic:** Carbonite will use its default settings for your backup, which are....

- The contents and subfolders in your *C:/Users* folder (*C:/Documents and Settings* folder in Windows XP) will be included in your backup
- Backup operations are not scheduled and will run continuously while your computer is on and connected to the internet
- Carbonite will manage your encryption key

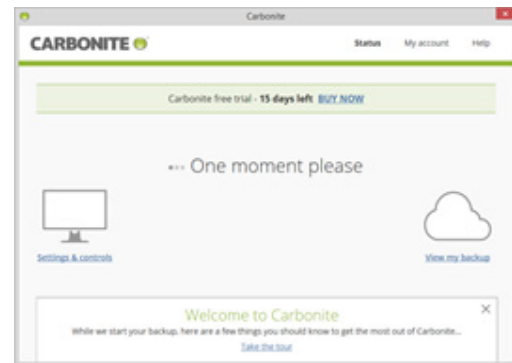
**Advanced:** Carbonite will allow you to change the default settings before beginning your backup, including....

- Starting with nothing selected for backup (allows you to choose one file/file type at a time)
- Setting a schedule for your backups to take place (instead of continuously running)
- Choosing to manage your own encryption key (*This is only available for Administrators. It is NOT recommended for the average user and will disable the Anytime Anywhere Access feature*).

4. The next screen shows you what to expect during your initial backup.

- Carbonite can't back up while the computer is in sleep mode. Temporarily disabling sleep mode will help your initial backup complete as quickly as possible.

5. The Carbonite application will appear near your system clock. The first message is "Welcome to Carbonite!". You can click the gray **X** to close the introductory message and view your backup progress, or click **Take the tour** to browse the application.



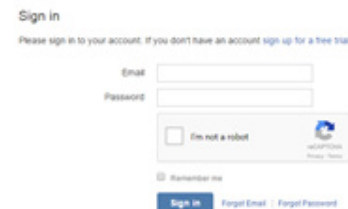
The installation is now complete. Carbonite will begin backing up your computer following the settings you chose during the installation.

The initial backup of your computer can take up to several days. This is normal for an initial backup, since you are starting from scratch and everything has to be uploaded. After the initial backup completes, Carbonite will periodically scan your backed-up files for changes and only upload changed files throughout the day. These automatic maintenance backups take much less time to complete and will take place in the background while you use your computer normally.

## Inviting Other Users / Administrators to the Account

Administrators (and Billing Owners) can invite other users to the account. There are a few ways to do this. You can view all of them [here](#). For one method, follow the steps below.

1. Log into your account at [account.carbonite.com](https://account.carbonite.com).

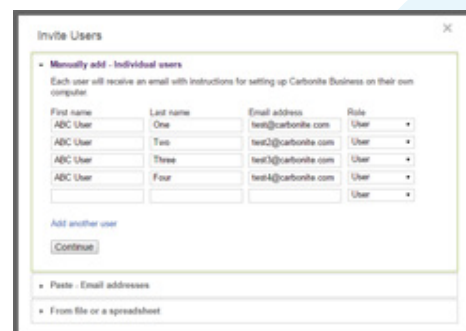


### Invite others to back up

Let other people at your company install Carbonite and back up to this account

2. Click **Invite others to back up**.

3. A popup will open with several text boxes. Enter the first name, last name and email address for everyone you'd like to invite in the appropriate boxes. Select the role you would like each user to have in the dropdown menus on the right. Once finished, click **Continue**.



- *Users* can log into their own accounts, manage their own personal information and view/access the backups for all the computers assigned to them.
- *Administrators* can do everything a user can do, but they can also change the roles of other users on the account, add and remove users, and reassign computers between users. They can also become the Billing Owner by entering new billing information.



4. You will see a confirmation once you send the invites. This method sends an email to each user with a link. When invited users click the link, they will log into Carbonite while entering their essential account information. When finished, they will be added to your account.

- If you see an error at this point, it is likely because at least one of your entered emails was invalid.

# Buying a Subscription

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There are two ways to begin a paid subscription: purchasing a new subscription immediately, or converting a trial to a paid subscription.

## Subscription Pricing

Carbonite plans are available in annual subscriptions. The price per year depends on the type of product you are purchasing.

Billing Owners can also purchase subscriptions for multiple years and receive a discount. More details about these plans, pricing and the features available for each product can be found [here](#).

## Purchasing a Subscription

1. From the [carbonite.com](https://carbonite.com) homepage, click **Get started**, then click **Buy now** on the plan you'd like to purchase.
2. Select the plan length (you can save money by purchasing longer subscription lengths), add storage packs (if desired), then select **Next step**.
3. Click **Continue to billing** once this information has been entered.
4. Enter your billing information, then click **Complete my purchase**.
5. A purchase confirmation will be displayed and an invoice will be emailed to you. Click **Install on this Computer** to begin downloading the software.

## Converting a Trial to a Paid Subscription

1. Log into your trial account at [account.carbonite.com](https://account.carbonite.com).
2. Click **Buy Now** in the top right.
3. Click **Buy Now** under the plan you'd like to purchase.
4. Click the subscription length that you'd like to purchase and select additional storage packs, then click **Continue to billing**.
5. Enter your billing information, then click **Complete my purchase**.
6. A confirmation will be displayed and an invoice will be emailed to you.

## Need Assistance Purchasing?

You can [search our Knowledge Base](#) for assistance with purchasing a subscription.



# How to Back Up Files

You can manually add files to your backup regardless of selecting *Automatic* or *Advanced* backup settings during the installation.

There are a few methods to add files/folders to your backup:




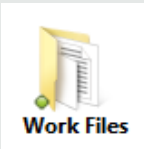



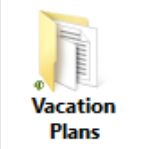

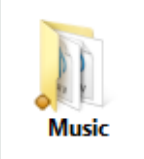
## Adding Selected File(s) / Folder(s) to your Backup

1. Locate the file(s) and/or folder(s) you want to add to your backup in Windows Explorer.

2. Right-click your selection, then select **Carbonite; Back this up**.



Done. You will see Carbonite status dots appear in the corner(s) of the file/folder icon(s), indicating that these files are now selected for inclusion into your backup. When those dots turn green, the files are backed up.

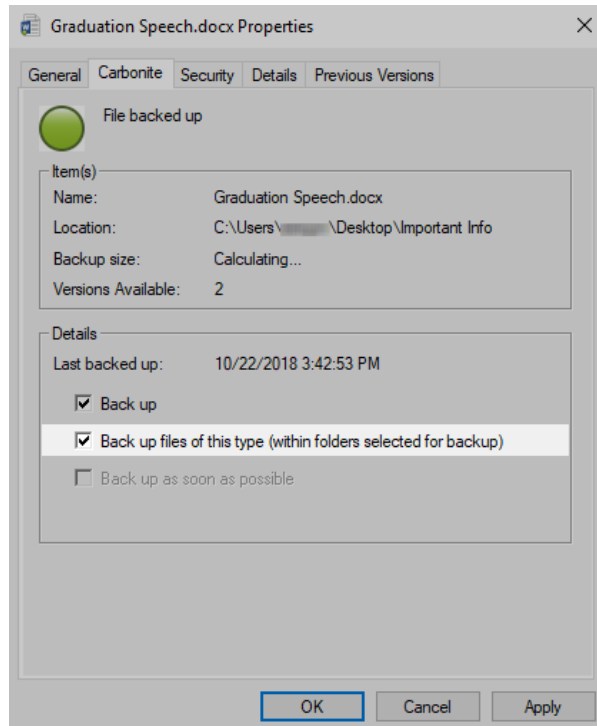
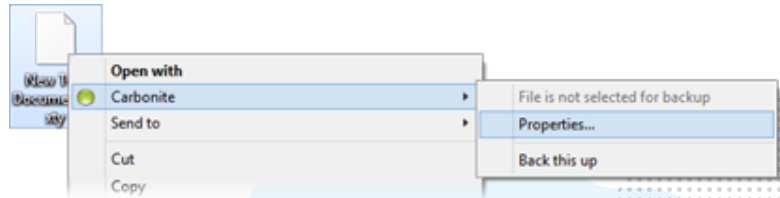
Status Dot Key	
Files	Folders
  Awesome Recipes.docx A green dot indicates the file is backed up	  Work Files A green dot indicates that all files within the folder that can be backed up are backed up.
  Company Video.mp4 A yellow dot indicates a file is selected for back up, but the latest version is not yet backed up.	  Vacation Plans A green half circle indicates that not everything within this folder is selected for backup, but the selected files/folders are all backed up.
	  Music A yellow dot indicates that some contents of this folder have been selected for back up, but are not yet backed up.

# Adding All Files of a Certain Type to your Backup

You can also instruct Carbonite to back up a file type (if that type is not already included). This will add all files of this type within selected folders to your backup. If you create any more files of that type, they will be included in your backup automatically going forward.

To select a file type for backup:

1. Right-click your selection, then select **Carbonite; Properties**



2. In the Carbonite tab, mark the **Back up files of this type (within folders selected for backup)** checkbox. Click **OK** to apply your changes.

**Note:** Any files larger than 1 TB will not be automatically selected. If you choose to back up all files of a certain type, but a file of that type is larger than 1 TB, that particular file will remain unselected. You can manually select files larger than 1 TB using the instructions from the previous page.

# Excluded File Types and Locations

There are certain types of files and folder locations that cannot be selected for backup for various reasons. Some examples include:

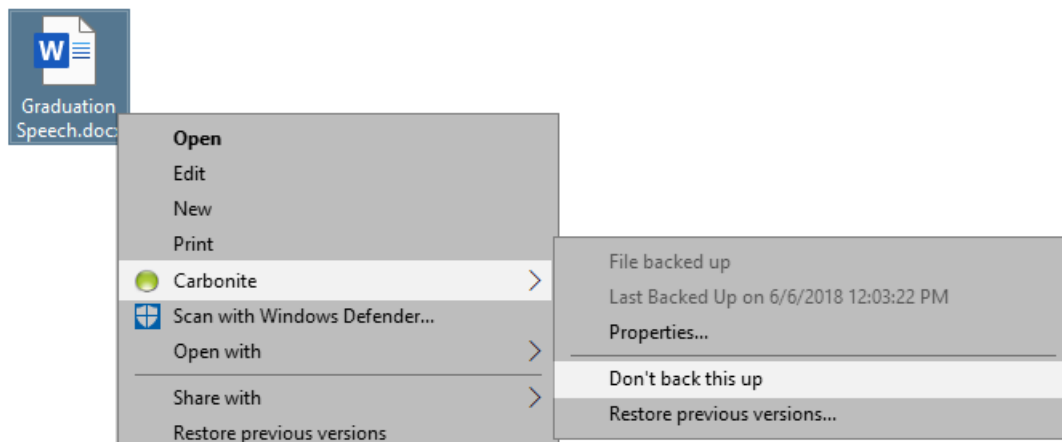
- **Programs**
  - Programs are installed to a computer's specific environment. Restoring a program to a different computer will not function properly and may even cause errors, so we exclude them.
- **Temporary files**
  - Many programs write temporary files on your machine. These files are often constantly changed, which would force Carbonite to continually update them. Since these temporary files do not contain any of your actual data, we prevent them from backing up.
- **System files/information**
  - These files depend on the hardware and environment. Restoring them to a different computer would likely cause problems. Therefore, we do not back them up.

For full details on file types Carbonite backs up, please [click here](#) or [search our Knowledge Base](#).

## How to Remove Files

If you are currently backing up a file (or folder) that you don't want in your backup, removing it from the backup is easy.

1. Right-click the file (or folder) and select **Carbonite; Don't back this up**.



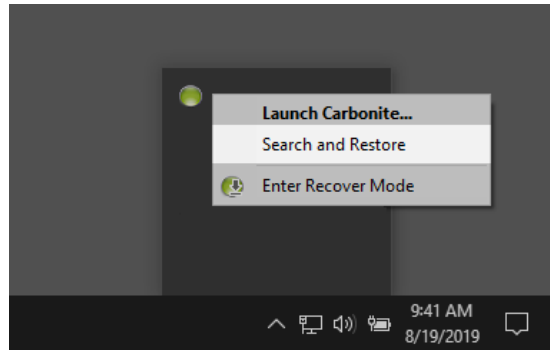
Deselecting a file this way will make sure that Carbonite no longer backs up the file. Any versions in your backup will be removed within 72 hours (so you do have a little time to change your mind).

If you remove a folder from backup this way, all files within the folder will stop backing up, and their backed up versions will remove themselves from the backup within 72 hours. Furthermore, *no future files you save in that folder will be backed up.*

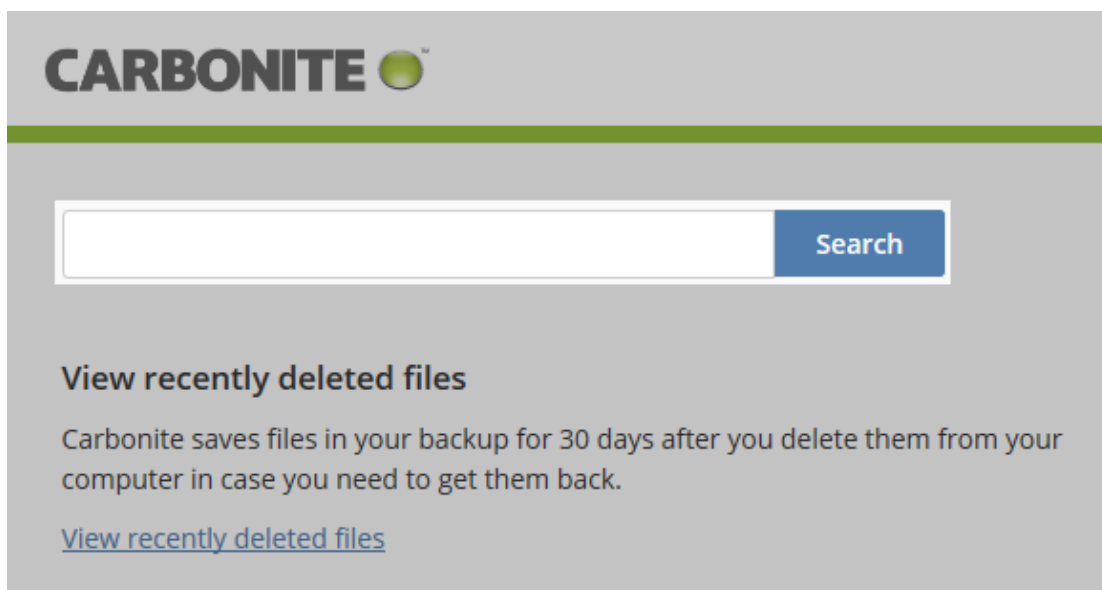
# Testing a Restore

We encourage all users to test the restore process to ensure that the connection between the Carbonite servers and your computer remains strong.

1. Copy a file on your computer, and make sure it is backed up with Carbonite (look for the green status dot).
2. Once the file shows it is backed up, delete it from your computer.
3. Open **Carbonite Search and Restore** by right-clicking the Carbonite icon in your system tray and selecting **Search and Restore**.

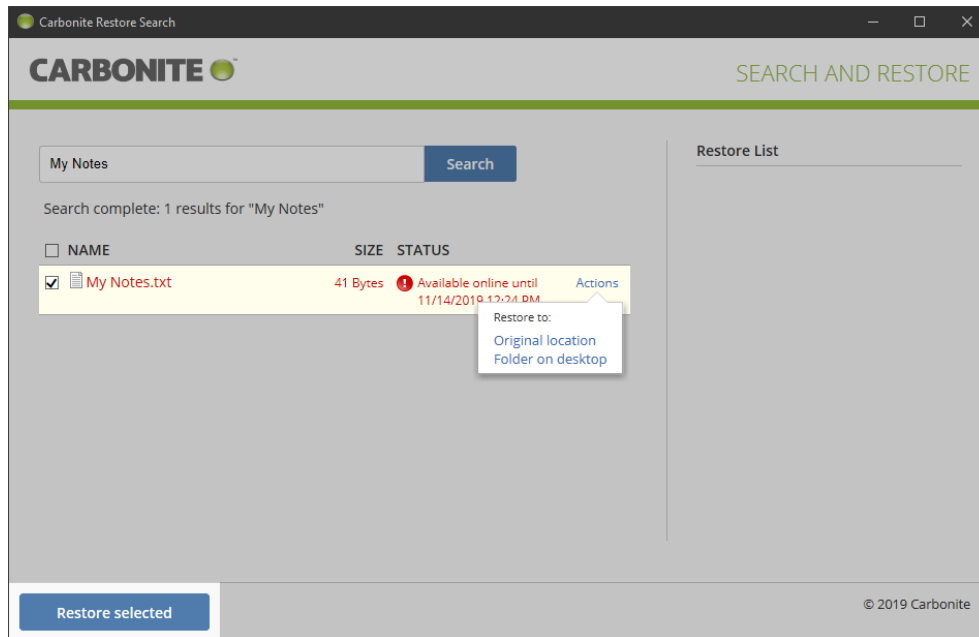


4. In the window that appears, type the full or partial name of the file you just deleted into the text box, then click **Search**.

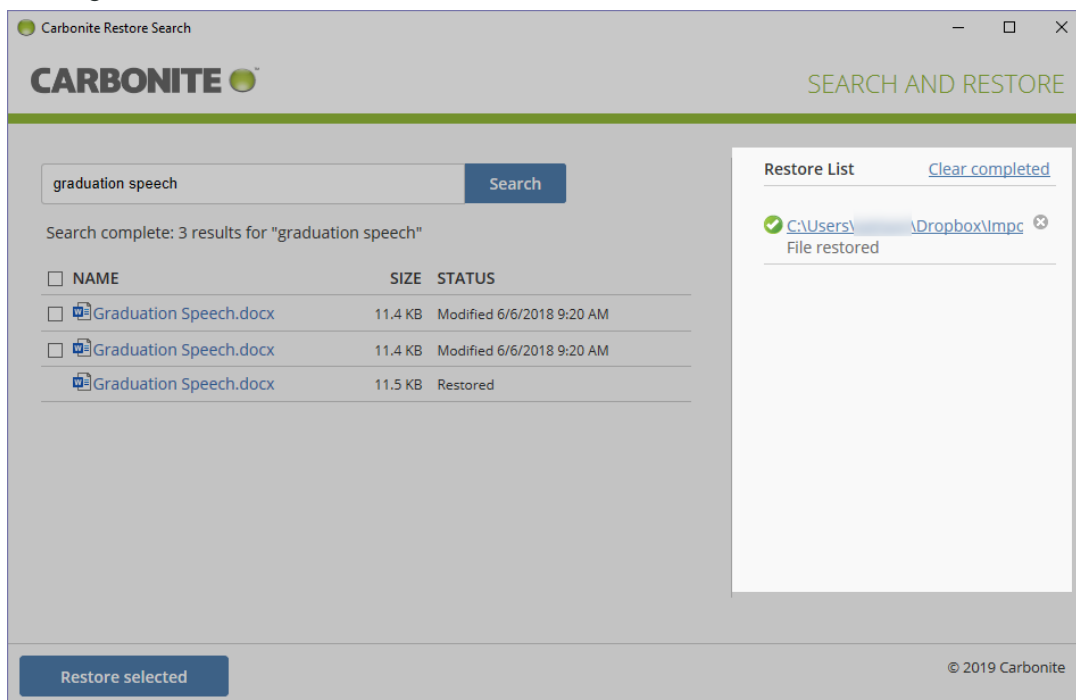


5. The name of your file should appear in red text. Mark the checkbox next to the file, then click **Restore selected**.





6. When the restore completes, the file will no longer show red text, and you will see it in the *Restore List* to the right with the status "File restored".



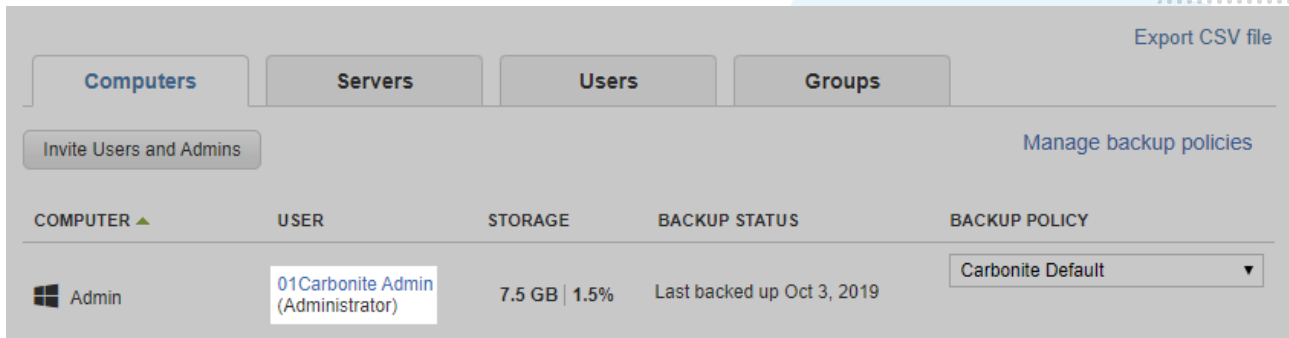
7. Browse back to the location where you deleted your file from. You should see the restored file there.

# Anytime Anywhere Access

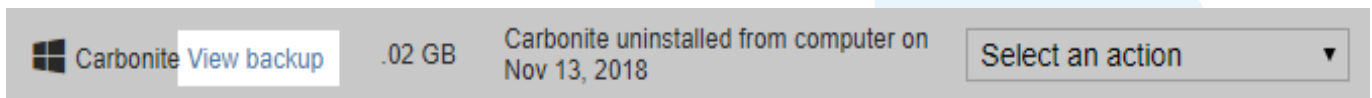
Once your backup contains files, you can log into your account online and from any internet-connected computer to view your files.

You can also download copies of your files to that computer if you need to use them wherever you are. Keep in mind that any changes you make to those copies remotely won't be backed up, since the Carbonite software is not actually on this machine.

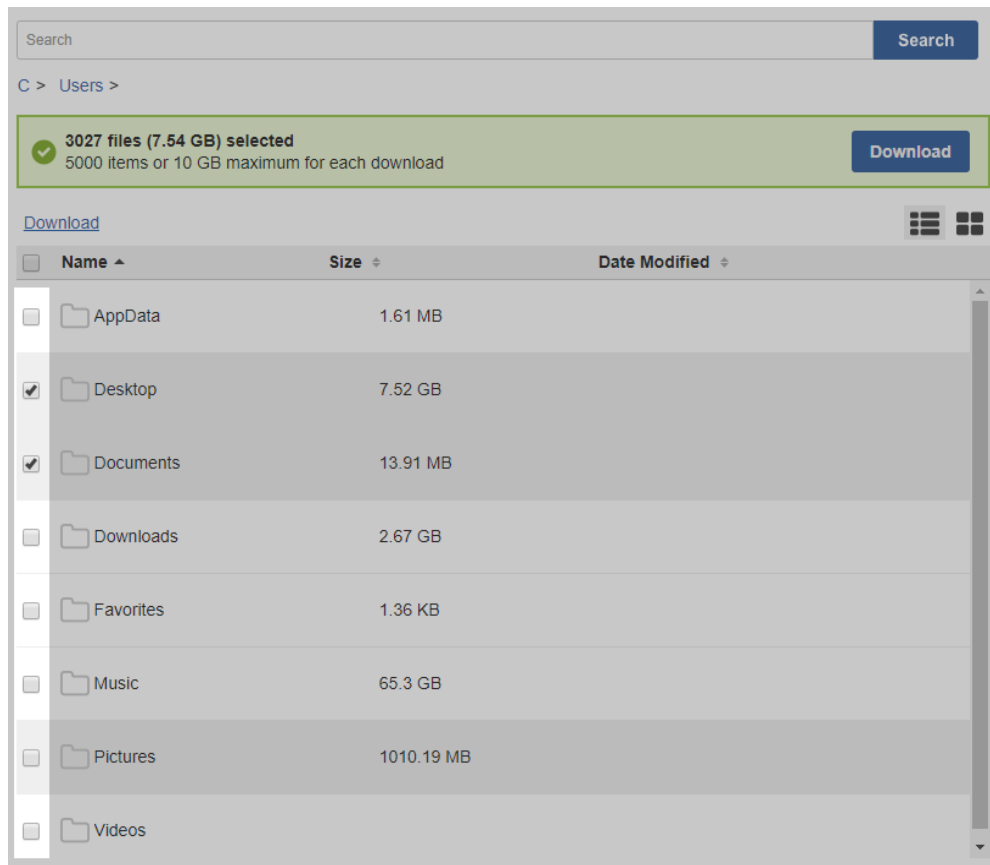
1. Log into your account at [account.carbonite.com](https://account.carbonite.com).
  - If you are an Administrator, click your name in the list.



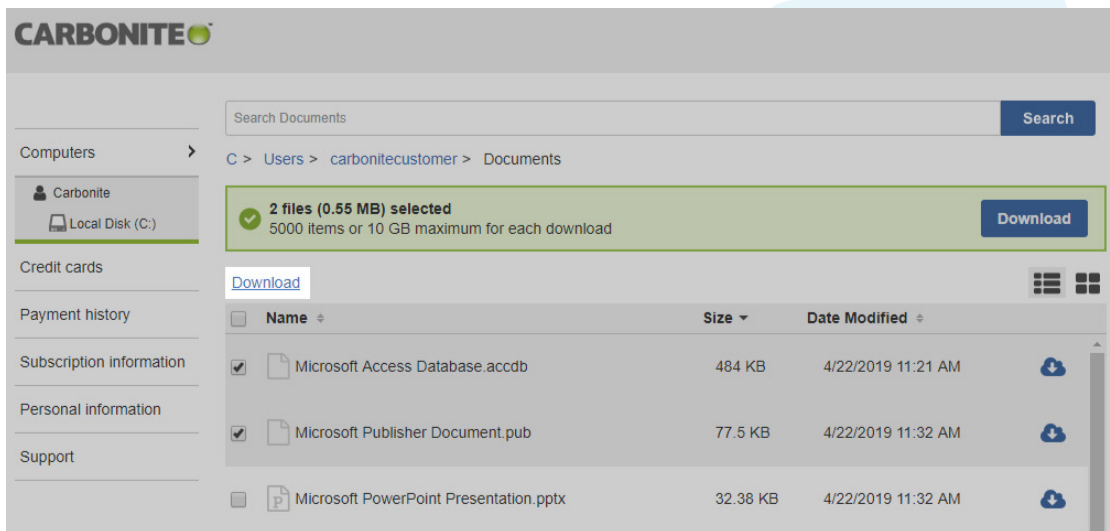
2. You will see your backed up computer(s) listed. Click the **View backup** link next to the correct computer.



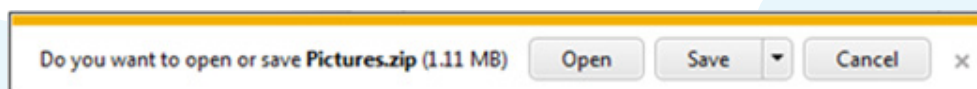
3. The library folders for your default user profile will display near the middle of the screen. You can click through the folders to browse your backed up files, the same way you would in Windows Explorer. In the *Devices* pane on the left, you can click a different user profile or a different drive letter to begin browsing your backup from there.
4. To select files to download to your computer, mark the checkbox(es) next to them.
  - You can select up to 5000 items or 10 GB to download at once.



5. Then click the **Download** button.



6. If you selected multiple files, they will be combined in a single .zip file before downloading. Single files will download normally. Click the **Save** option in your web browser to save the file. You will then be able to open and use the file(s) normally.

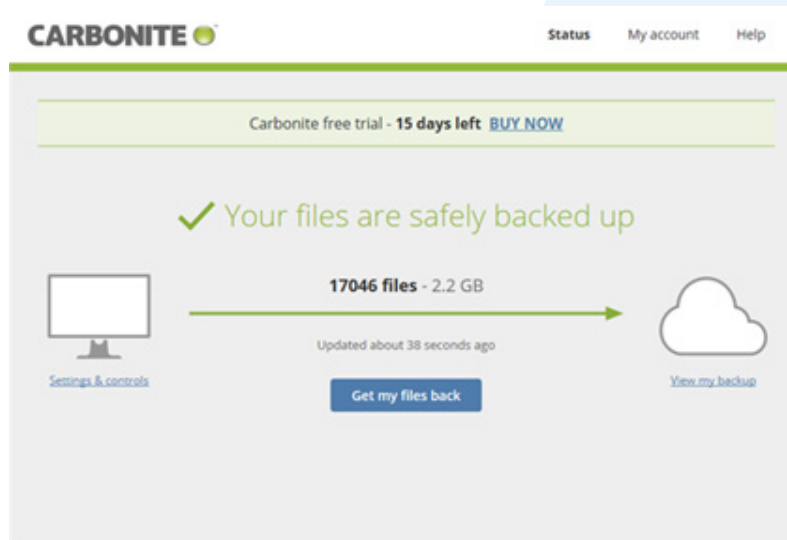


# The Carbonite Application

The Carbonite application is the user interface for your Carbonite backup. It allows you to pause the backup, restore files, change backup settings, review account details, and contact Customer Care.

The Carbonite application can be opened on the computer where Carbonite is installed by double-clicking the Carbonite icon in your system tray. It can also be accessed via the Start Menu if you are using Windows XP, Vista, 7, 8.1, or Windows 10.

## The Status Tab

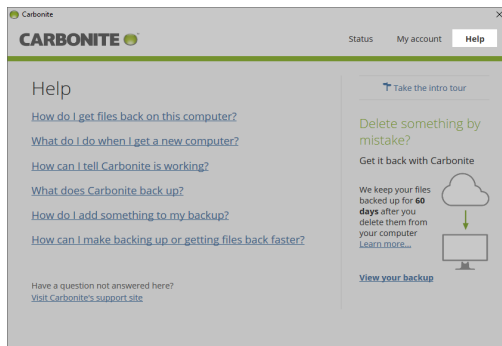


Once opened, the Carbonite application will display the Status tab.

- **Backup Size:** Displays the number of files backed up and their total size in Gigabytes.
- **Backup Status:** Indicates whether your backup is up-to-date, in Recover Mode, in progress, or overdue. Information about errors will also be indicated here, if they occur.
- **View my backup:** Allows you to check which files you've backed up to the Carbonite cloud.
- **Get my files back:** Restore deleted or missing files with Carbonite.
- **Settings & controls:** Allows you to set a backup schedule, pause your back up, toggle Carbonite's colored status dots, and more.



## The Help Tab



The *Help* tab gives you easy access to the Carbonite Knowledge Base.

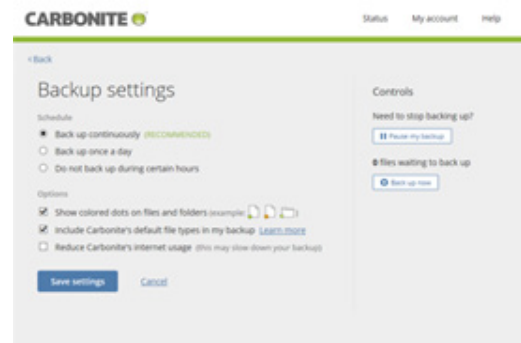
The **Intro Tour** is great for first-time Carbonite users.

You can also view your backup from this screen.

Helpful Knowledge Base articles will be listed here for things like:

- Restoring files
- Backing files up
- Checking your backup status
- Speeding up your backup or restore

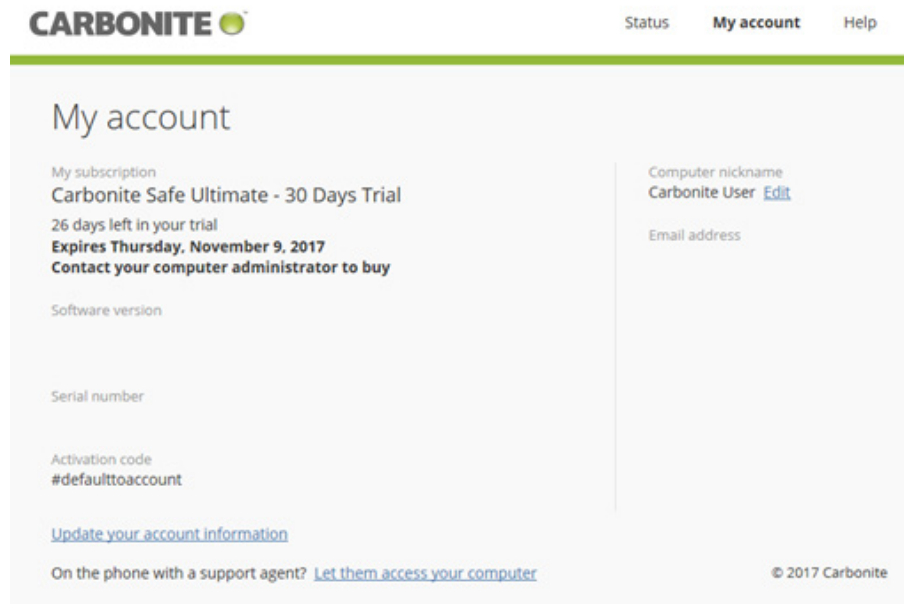
## The Settings Tab



The Settings tab contains the following options:

- Control the display of the colored dots on files and folders
- Schedule your backup to begin at a certain time each day, or to not back up between certain hours
- Slow Carbonite's internet usage - useful when you are running other resource-intensive programs at the same time
- Enable or disable Carbonite's default backup selections.
- Pause Carbonite when you need to temporarily stop backup operations.
- Backup Now button to back up pending files immediately.

# The My Account Tab



The My Account Tab contains the following options:

- **Product Name:** This will display the current product of Carbonite you are running.
- **Expiration date:** This area shows you when your subscription is set to expire. When your Carbonite subscription expires, we will keep your backed-up data on our servers for 30 days. If you are running a trial, your data will be saved on our servers for 15 days after your trial expires.
- **Software version:** Here you can view what version of the Carbonite software you are running. If you do not have the latest version of Carbonite, our software will prompt you to update to the latest version through a pop-up window.
- **Serial number:** This area shows you the serial number associated with this computer. Your serial number is unique for each computer registered with Carbonite.
- **Activation Code:** This area shows you the activation code of the current subscription you are running. On a Pro account, this will always display as #defaulttoaccount.

The panel on the right displays information related to your account and where your backup is located:

- **Computer Nickname:** This is the nickname that you have given this computer when you first installed Carbonite on it. To change the nickname associated with this computer, click the **edit** link.
- **Email Address:** This area shows you the email address that your subscription is associated with.

# Your Carbonite Account

Selections and settings for backups and restores are controlled from the computer where Carbonite is installed, but your online Account Dashboard is the control hub for all other aspects of your account. Each user on your account has their own login credentials that enables access to everything they have permission to use. **From within the Account Dashboard, all users can:**

- Reinstall Carbonite
- Transfer a subscription to another computer
- Remotely access backed up files
- Update their email address, password, security questions and security phone

## Administrators and Billing Owners can also:

- View a breakdown of the total backup size by computer, user or group
- Invite other Users and Administrators to the account
- Add/assign computer backups to users
- Apply backup policies to computers
- Convert a trial to a full subscription (Once an Administrator does this, they become the Billing Owner)
- Change the Billing Owner

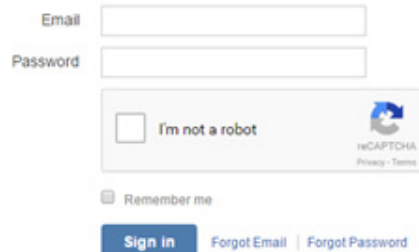
## In addition, Billing Owners can:

- Update the billing and company information
- Check the billing history
- Change automatic billing status

You can log into your account any time after installing Carbonite by navigating to [account.carbonite.com](https://account.carbonite.com) in your web browser and entering your login credentials:

### Sign in

Please sign in to your account. If you don't have an account sign up for a free trial.



The sign-in form includes fields for Email and Password. Below these is a checkbox for 'Remember me' and a 'Sign in' button. To the right of the password field is a reCAPTCHA widget with the text 'I'm not a robot' and a 'Privacy - Terms' link. Links for 'Forgot Email' and 'Forgot Password' are located at the bottom right of the form.

If you experience difficulty logging in, click *Forgot Email* or *Forgot Password* for assistance.

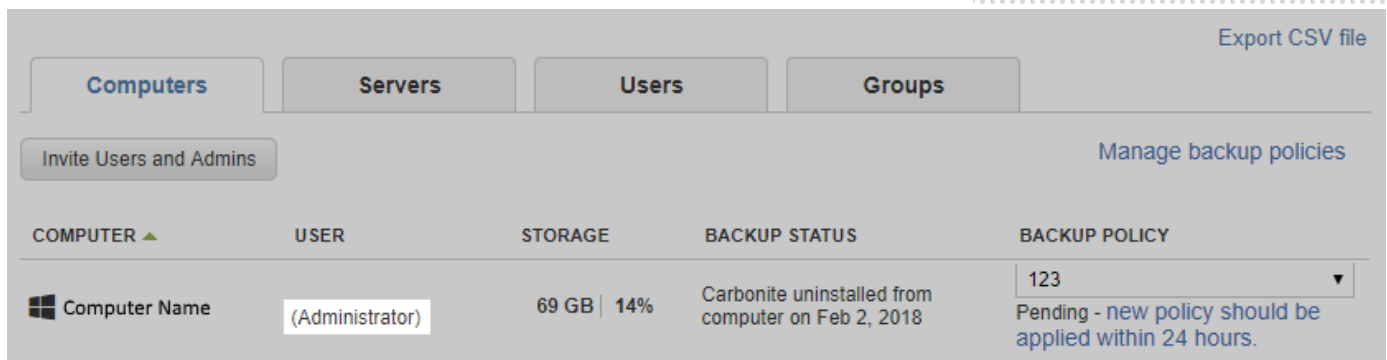
After your account is established, Carbonite requests some information from you to help it stay secure. We will use this information to identify you as the account owner if you ever need help with account-related problems (like resetting your password).

You'll be required to fill out some contact information and enter security questions when you log into your online account for the first time. You're also encouraged to set up Two-Factor Verification to make receiving assistance easier and more secure.

## Installing Carbonite

All users can install Carbonite, as long as an Administrator has assigned a computer to them. Administrators can add a computer and install at the same time.

1. Log into your Carbonite account at [account.carbonite.com](https://account.carbonite.com).
  - If you are an Administrator, you will next have to click your name in the *Computers* tab to select. Regular users will not see this screen.



2. You will see a list of computer backups assigned to you. If there is a backup assigned that has not been installed yet, the *Backup Status* will read **Not yet installed**. Click the dropdown under *Computer Actions* and select **Install on this computer**.

COMPUTER	TOTAL STORAGE	BACKUP STATUS	COMPUTER ACTIONS
Computer Name	-	Not yet installed	Select an action
Carbonite Computer View backup	.01 GB	Carbonite uninstalled from computer on Jan 9, 2017	Select an action
			Delete computer
			Install on this computer
2 computers (1 pending)	.01 GB		

3. Click **Download now** to download the Carbonite installer. When the download finishes, simply run the file and follow the on-screen instructions to finish the installation.

### Download the Carbonite installer

[Download now](#)

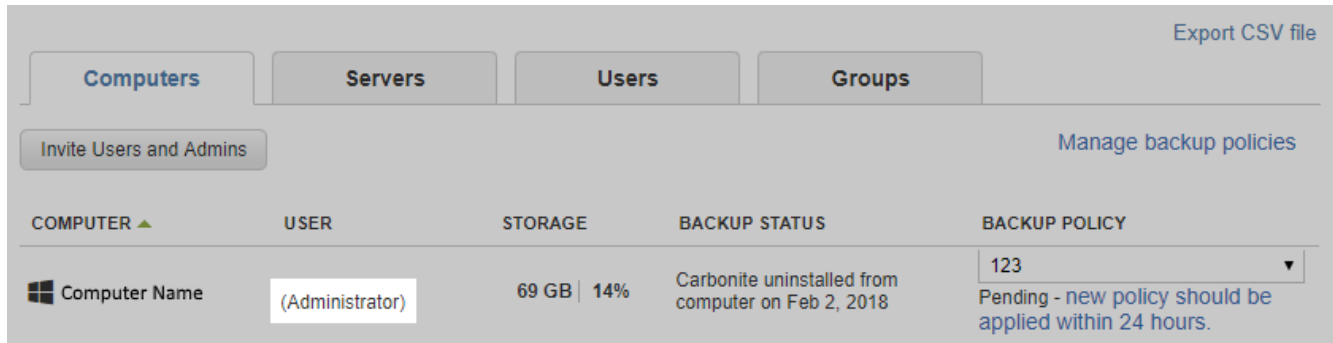
Note: You need to be on the computer you want to protect with Carbonite when you download this installer.



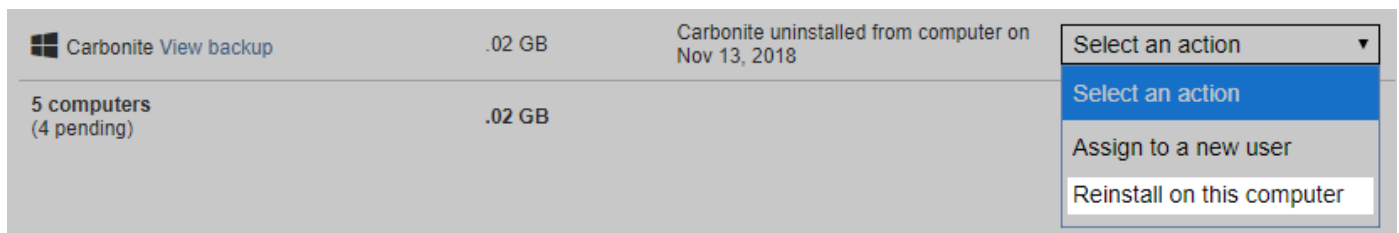
# Reinstalling or Transferring Carbonite to a Different Computer

Reinstalling or transferring Carbonite to a different computer are done in the same way.

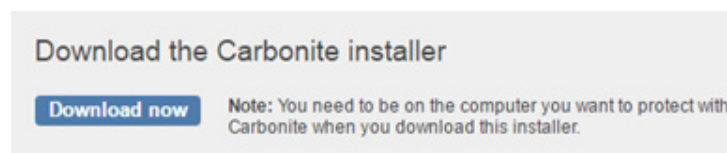
1. If you want to reinstall Carbonite to the same computer, log into your account using that computer. To transfer Carbonite to a new computer, log in from the new computer.
  - If you are an Administrator, you will next have to click your name in the *Computers* tab to select. Regular users will not see this screen.



2. You will see a list of computer backups assigned to you. Click the dropdown under Computer Actions and select **Reinstall on this computer**.



3. Click Download now to download the Carbonite installer. When the download finishes, simply run the file and follow the on-screen instructions to finish the installation.



## Updating Your Security Information

You can use your account to update your contact information, password, security phone number, and security questions at any time.

1. Log into your account at [account.carbonite.com](https://account.carbonite.com).
2. Click **Personal Info** in the menu on the left.

## Carbonite Safe Ultimate

[Backup Dashboard](#)[Notifications](#)[Manage Backup Policies](#)[Account Summary](#)[Billing Information](#)[Personal Information >](#)[Get Help](#)[Contact Us](#)

3. Your current personal information will be displayed on the screen. Click the **edit** link next to any of the headers to change the related information.

[Backup Dashboard](#)  
[Notifications](#)  
[Manage Backup Policies](#)  
[Account Summary](#)  
[Billing Information](#)  
[Personal Information >](#)  
[Get Help](#)  
[Contact Us](#)

## Personal Information

Contact information [\(edit\)](#)

Password [\(edit\)](#)  
\*\*\*\*\*

Two-Step Verification (recommended) [\(edit\)](#)  
For extra account protection. We will send a unique code to your phone to identify yourself at log in or if you forget your password.  
No phone number on file

Security questions [\(edit\)](#)  
What is your maternal grandmother's first name?  
What is your father's middle name?  
What was the name of your first boyfriend or girlfriend?

## Updating your Security Questions

When editing your security questions, your three current questions will show and your answers will be masked. You can change the questions by clicking the dropdown menus and selecting a new question. Your updated answer will not be masked until you click **Save**.

Security Questions [\(edit\)](#)

Question 1: What is your maternal grandmother's first name?  
Answer: \*\*\*\*\*

Question 2: What is your father's middle name?  
Answer: \*\*\*\*\*

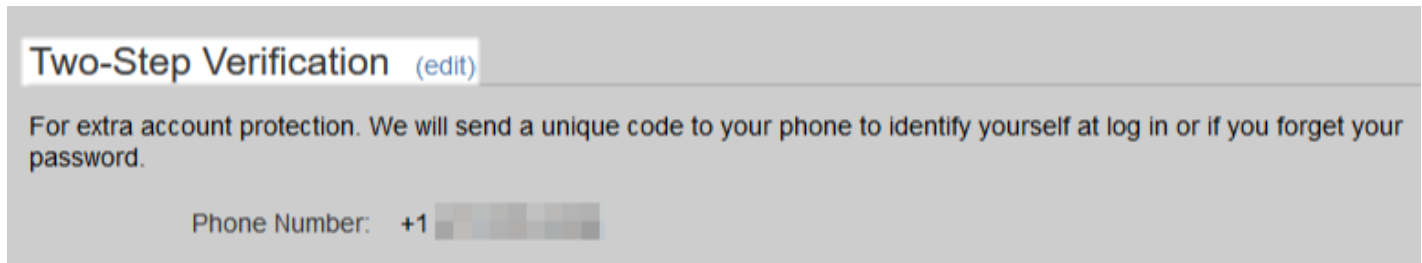
Question 3: What was the name of your first boyfriend or girlfriend?  
Answer: \*\*\*\*\*

[Save](#) [Cancel](#)

## Updating Your Two-Factor Verification Information

When updating your security phone, we will send you a confirmation code to that phone number, either by call or text message (your choice). Enter this code in the next popup to confirm your valid number.

1. Click **edit** next to *Two-Step Verification*.

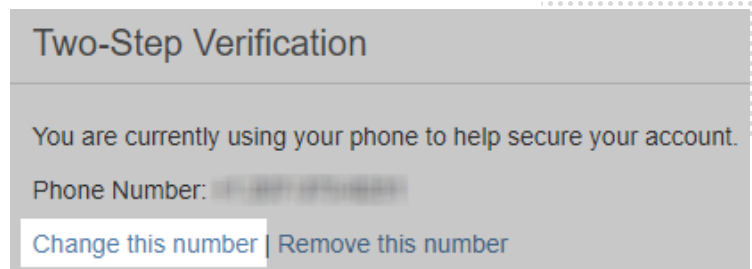


**Two-Step Verification** (edit)

For extra account protection. We will send a unique code to your phone to identify yourself at log in or if you forget your password.

Phone Number: +1 [redacted]

2. If you already have a phone number entered, you will see the following popup. Click **Change this number**.

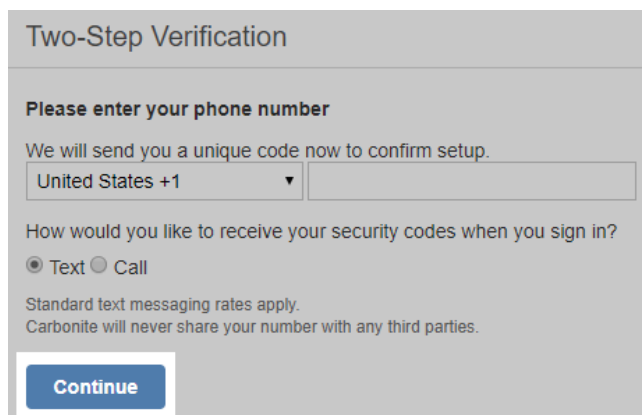


**Two-Step Verification**

You are currently using your phone to help secure your account.

Phone Number: +1 [redacted]

[Change this number](#) | [Remove this number](#)



**Two-Step Verification**

**Please enter your phone number**

We will send you a unique code now to confirm setup.

United States +1 [redacted]

How would you like to receive your security codes when you sign in?

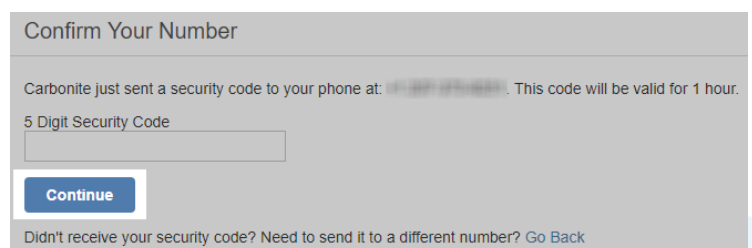
☒ Text ☐ Call

Standard text messaging rates apply.  
Carbonite will never share your number with any third parties.

[Continue](#)

3. Enter a new phone number and choose to receive a text or call with your verification code, then click **Continue**.

4. You'll receive a text message or voice call with a verification code. Enter that code in the next popup, then click **Continue**. If you entered the correct code, your security phone will be updated to the new number.



**Confirm Your Number**

Carbonite just sent a security code to your phone at: +1 [redacted]. This code will be valid for 1 hour.

5 Digit Security Code

[redacted]

[Continue](#)

Didn't receive your security code? Need to send it to a different number? [Go Back](#)

# Administrator and Billing Owner Privileges

Administrators (and Billing Owners) have access to more feature and have more control over how the total backup space is delegated throughout the account.

## Viewing the Backup Storage Indicator

Administrators have a convenient progress bar in the center of their dashboard that displays the total backup size used as a percentage of the total backup size available. The actual size used in GB is written at the end of the progress bar itself.

Storage by group ▾

1.81 GB



The progress bar is broken into sections, each section potentially containing light and dark yellow. This is a visual aid to help you determine how much space each individual computer, user or group is using on your account. You can change whether the progress bar sections represent computers, users or groups by clicking the dropdown menu above the bar itself and choosing how to view the storage.

Storage by user ▾

Storage by user

Storage by computer

In this example, we are viewing backup progress by computer. Each section of the progress bar represents a computer on the account. Dark yellow sections represent data that is already backed up from that computer. Light yellow sections represent data pending backup from that computer. You can hover the mouse cursor over any section for a summary of the backup info for that computer.

.01 GB



Users

1 users, 3 computers

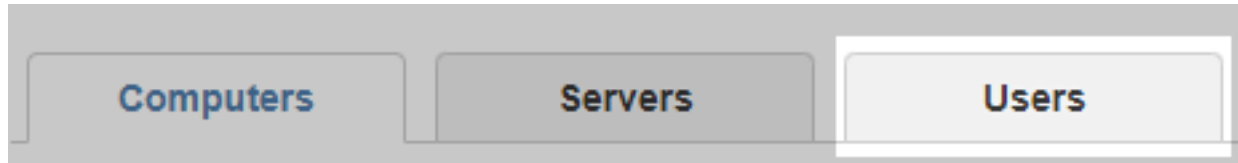
Backup status: 2 not yet installed, 1 uninstalled.

The same principles apply if viewing the total storage by users or by groups (if you have created groups on your account). This quick access to the backup information is designed to help you see if a certain user, computer or group is taking up too much space on your account and adjusting accordingly.

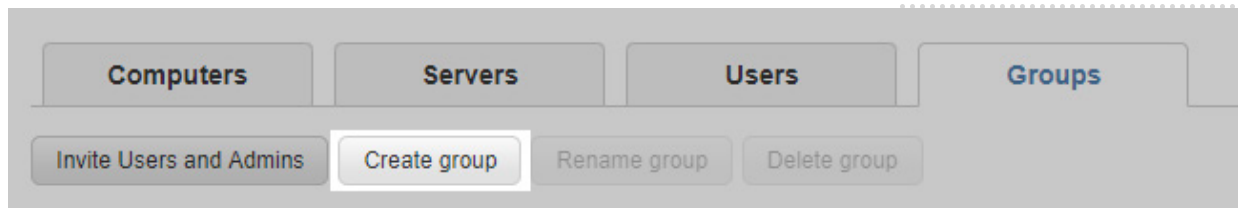
# Adding User Groups

Groups can help organize your users into groups you define to help you keep things easily manageable. To add a group:

1. Log into your account as an Administrator at [account.carbonite.com](https://account.carbonite.com).
2. Click the **Users** tab near the bottom of your dashboard.



3. Click the **Create group** button.



4. Enter a Group name at the top of the popup. Select all the users you'd like to assign to this group by marking the checkbox next to each user name. Then click **Create**.



**Note:** Users cannot be a member of more than one group. If you assign a user who is already in a “group A” to “group B,” they will no longer be a member of “group A.”

5. After adding the group, you will notice a new *Groups* tab at near the bottom of your dashboard. This tab functions much like the *Users* tab, although it lists groups instead of users. Click any of the groups in the Groups tab to view the users belonging to that group.

The *Users* tab will now only display users unaffiliated with any groups.

Users

Backup Dashboard > Users

Group summary

1 user, 4 computers  
70 GB (14% of 500 GB)

Backup status

User profile actions

- Rename group
- Delete group

Users Computers

Invite Users and Admins Create group Move to group

Expand all Collapse all

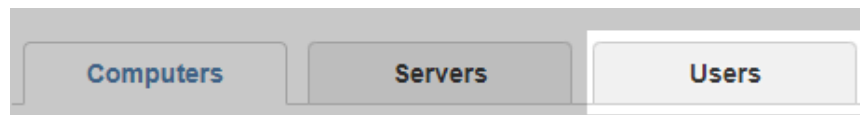
USER	COMPUTER	TOTAL STORAGE	BACKUP STATUS
<input type="checkbox"/> Administrator (Administrator)	4 Computers	70 GB   14%	See All
1 users (1 administrators)	4 computers (2 pending)	70 GB   14%	4 problems

## Adding/Assigning Backups to Users

Administrators can add and assign computer backups to other users across the account. This allows Administrators to control the amount of computers added to the account. When granting a computer backup to a user, a new computer will appear when the user next logged in labeled as **Not yet installed**. The user can click the dropdown next to the new computer in the list to install Carbonite on the computer they logged in from.

To add a new backup to another user:

1. Log into your account as an Administrator at [account.carbonite.com](https://account.carbonite.com).
2. Click the **Users** tab near the bottom of your dashboard.



3. Click on the user name you'd like to add a computer for.

USER	COMPUTER	TOTAL STORAGE	BACKUP STATUS
<input type="checkbox"/> Administrator (Administrator)	5 Computers	.02 GB   0%	See All

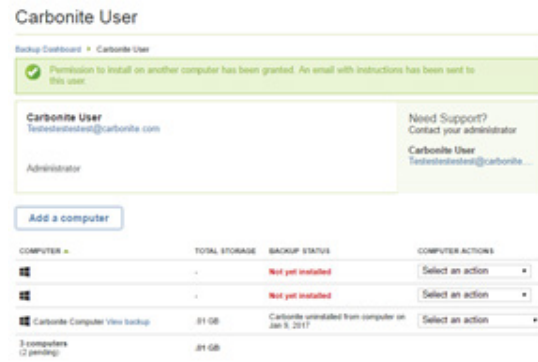
4. Click the **Add a computer** button above the list of computers currently assigned to this user.

Add a computer

COMPUTER	TOTAL STORAGE	BACKUP STATUS	COMPUTER ACTIONS
Not yet installed	-	Not yet installed	Select an action
Carbonite Computer View backup	.01 GB	Carbonite uninstalled from computer on Jan 9, 2017	Select an action
2 computers (1 pending)	.01 GB		



5. You should see a confirmation appear near the header of the page, and a new computer line add to the user's assigned computers.

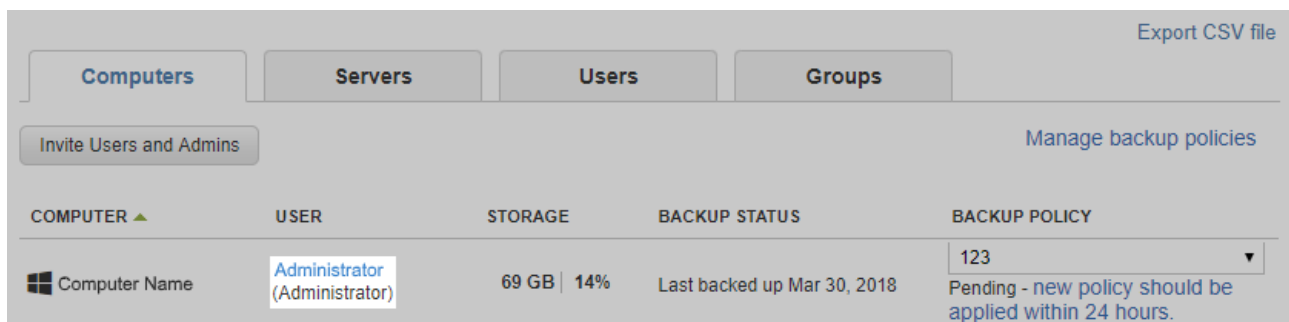


## Reassigning Backups to Other Users

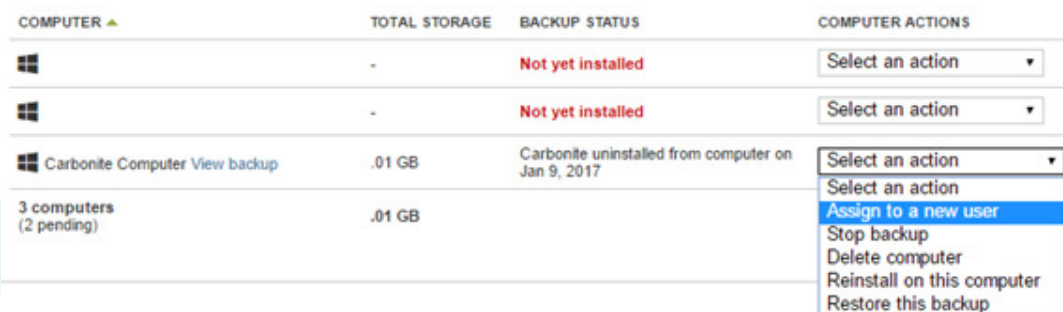
Administrators can reassign an existing computer backup to another user. Effectively, this will remove the backed up computer (and all associated controls) from one user and add it to another. This is useful to keep your account updated. For instance, if a user has left your organization, you can move their computer backup to a new user.

To reassign a computer backup to another user:

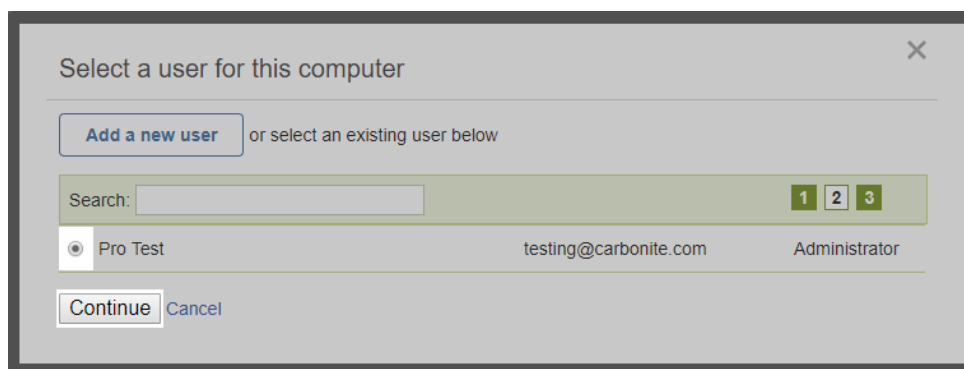
1. Log into your account as an Administrator at [account.carbonite.com](https://account.carbonite.com).
2. In the **Computers** tab near the bottom, find the computer you'd like to move. Click the user name next to that computer.



3. Find the computer on the next screen. Click the dropdown next to the computer and select **Assign to a new user**.



4. You'll see a popup. Here, you select the new user for the computer by adding a brand new user or clicking the radio button next to an existing user. Select a user to assign the backup to, then click **Continue**.



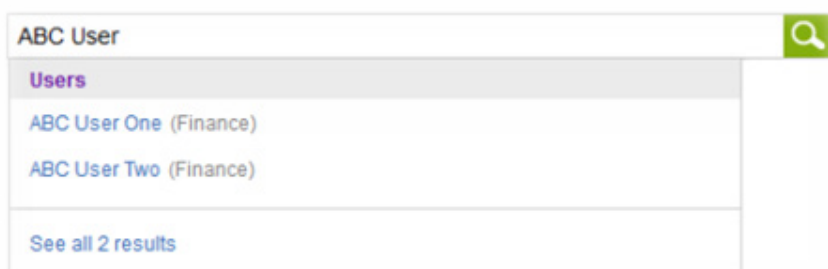
5. You will see a confirmation next to the top of your user's page, and the computer will no longer show under their list of assigned computers.

## Searching Your Account

If you ever have difficulty finding a user, group or computer on your account, you can use the search bar at the top of your account window to find it.



Type a text string into the search bar, and Carbonite will search all of the user names, computer names, group names, and email addresses for that string. Partial searches work: if you can only remember part of the name, Carbonite will display all items that contain the text you typed.



# Renewing Your Subscription

Carbonite offers subscriptions in the form of one year, two years, and three years for Carbonite Safe Core, Carbonite Safe Power, and Carbonite Safe Ultimate.

**Note:** You must be the Billing Owner on the account to perform any billing related activities, including renewing.

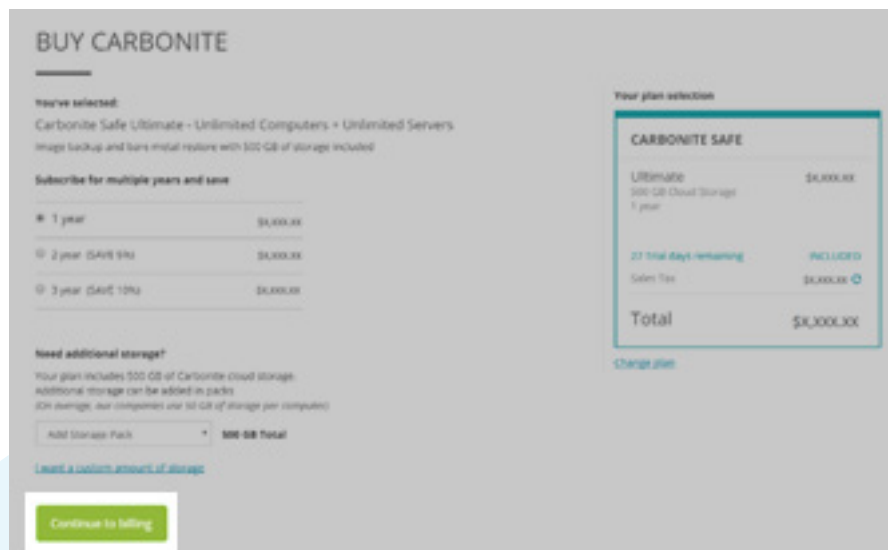
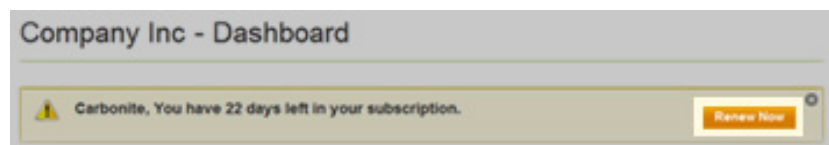
The easiest method to purchase a subscription is through your Carbonite account. The subscriptions available for purchase depend on how you originally signed up for Carbonite and which subscription you originally purchased for your computer. Alternatively, you can upgrade or downgrade your Carbonite subscription.

## Manually Renewing Your Account

Billing Owners can manually renew an active account at any time.

**Note:** For expired accounts, you have up to 30 days after expiration to renew the account before the data is purged from the backup servers.

1. Log into your Carbonite account at <https://account.carbonite.com>. You will see a banner at the top of your account dashboard notifying you that your account can be renewed. Click the **Renew Now** button.



2. Select a subscription length and storage amount, then click **Continue to billing**.

3. On the next screen, you can enter your billing information. Once finished, click **Complete my purchase**.

BUY CARBONITE

Order for Carbonite Safe Pro

This payment covers your subscription until November 15, 2018

Pay with

Name on card

Country

Credit card number

Expiration date

Security code

Billing address

Billing address continued

City/Town

Zip/Postal Code

State

Offer code

Enter offer code

By continuing, you agree to our [Terms of Service](#). Carbonite values your [Privacy](#).

Complete my purchase

YOUR PLAN SELECTION

CARBONITE SAFE

Ultimate

100 GB Cloud Storage

1 year

24 Total days remaining

Subs. Fee

Total

\$0,000.00

Change plan

## ORDER CONFIRMATION

Congratulations!

This payment covers your subscription through November 29, 2018.

[Explore my dashboard](#)

Receipt

Print

Name: LName  
your\_email@address.com  
Date of purchase: November 29, 2018  
Visa ending in XXXX

PLAN	AMOUNT
1x Carbonite	\$000.00 each
5x 100 GB Storage Pack - 2 Years	\$000.00 each
Subtotal	\$000.00
PAID	\$000.00

A confirmation email with order details has been sent to your\_email@address.com

4. Your order is now complete and you will be emailed a confirmation. Click **Explore my dashboard** to return to your Carbonite account.

## Managing Backup Policies

Backup Policies can be assigned to users or groups on your account. These policies determine what is automatically backed up when those users install Carbonite to their computer. Administrators can make these policies to help ensure that only the data types that are relevant to your business are backed up.

**Note:** Backup policies can only be assigned to the Windows version of Carbonite, and the computer must be running version 5.8 of the Carbonite software or higher. If the computer is running a version older than 5.8, reinstalling Carbonite will update the version and make the computer eligible for backup policies.

## Creating a Backup Policy

1. Log into your account as an Administrator or Billing Owner at [account.carbonite.com](https://account.carbonite.com).

Sign in

Please sign in to your account. If you don't have an account sign up for a free trial.

Email

Password

☐ I'm not a robot

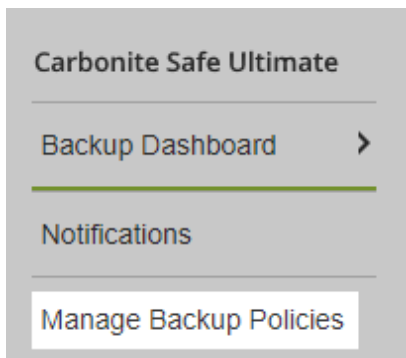


☐ Remember me

Sign in

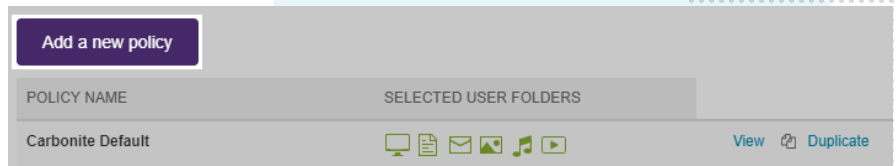
Forgot Email

Forgot Password



2. Once logged in, click **Manage Backup Policies** in the left navigation pane.

3. You'll see a list of the policies available. To add a new policy, click the **Add a new policy** button.



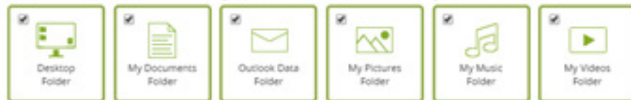
#### ADD A NEW BACKUP POLICY

What do you want to call this policy? (required)

Between 2 and 100 characters - only letters, numbers, or underscore

What do you want to back up by default?

Each user will also be able to manually add additional files and folders they want to back up



To back up folders that are not shown above, enter the path to each of them here

No more than 260 characters in length. For paths that change between computers, specify \* to include on all of them. For example: C:/Users/\*

[+ Add another](#)

Do you want to exclude specific file types?

Enter file extensions with a dot and separated with commas. For example: .mp3, .mov, .avi

Exclude: [Music](#) [Pictures](#) [Videos](#)

[Save settings](#)

[Cancel](#)

4. Define your new backup policy in the fields here (see explanations on the next page). When finished, click **Save Settings**.

## ADD A NEW BACKUP POLICY

What do you want to call this policy? (required)

Between 2 and 100 characters - only letters, numbers, or underscore

What do you want to back up by default?

Each user will also be able to manually add additional files and folders they want to back up

<input checked="" type="checkbox"/> Desktop Folder	<input checked="" type="checkbox"/> My Documents Folder	<input checked="" type="checkbox"/> Outlook Data Folder	<input checked="" type="checkbox"/> My Pictures Folder	<input checked="" type="checkbox"/> My Music Folder	<input checked="" type="checkbox"/> My Videos Folder
--	---	---	--	---	--

To back up folders that are not shown above, enter the path to each of them here

[Learn more](#)

No more than 260 characters in length. For paths that change between computers, specify \* to include on all of them. For example: C:\Users\\*

+ Add another

Do you want to exclude specific file types?

[Learn more](#)

Enter file extensions with a dot and separated with commas.

For example: .mp3, .mov, .avi

Exclude:

Music

Pictures

Videos

Save settings

Cancel

- Enter a policy name in the textbox at the top.
- Each of the six boxes listed correspond to the folders residing inside the user folder. Everything is selected with checkmarks. Unmark any checkboxes to remove that folder from your backup policy.
- Add specific folders to your backup policy by typing in the folder path manually. You can also use wildcards. To add more than one path, click + **Add another** and to add more text fields.
  - For instance, if every user in your company has a folder called "Company Name" on the root of the C: drive containing important information, you could enter C:\Company Name\\* in the box to add everything in that location to the backup by default.

**Note:** For a full list of specifically excluded locations, please [click here](#).

- In the bottom text box, enter in the file extensions that you would like to avoid backing up. You can click the *Music*, *Pictures* and/or *Videos* button to add the most common file extensions for those types of files.

5. The new backup policy will appear in the list of policies.

POLICY NAME	SELECTED USER FOLDERS
Carbonite Default	     
Sample Program Data Backup	     



## Editing or Deleting a Backup Policy

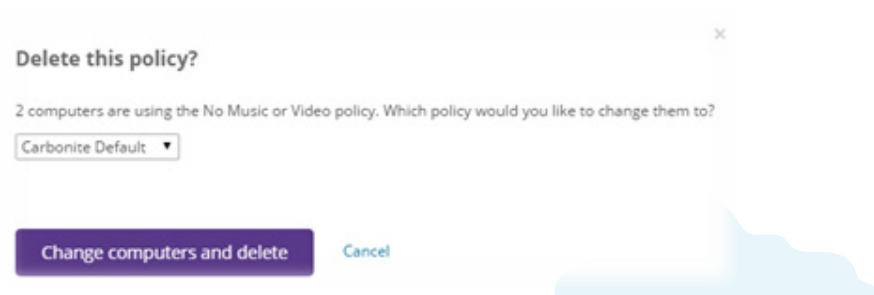
Click the **Edit** link next to the policy on the *Manage Backup Policies* page.



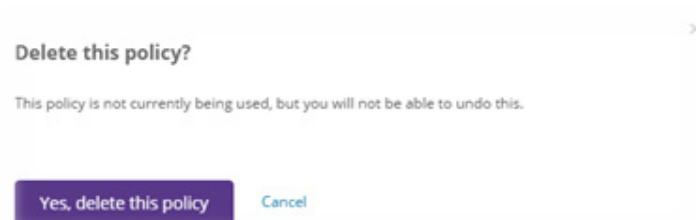
You can then adjust all of the fields that you set before. There will also be a **Delete this policy** link at the bottom of the page.



If you click that link and there are computers using this policy, you will have to choose a replacement backup policy and click **Change computers and delete**.



If there are no computers using the policy, you will be warned that the action is irreversible and must click **Yes, delete this policy** to continue.



## Assigning Backup Policies to Individual Computers

1. Log into your account as an Administrator or Billing Owner at [account.carbonite.com](https://account.carbonite.com).

Sign in

Please sign in to your account. If you don't have an account sign up for a free trial.

Email

Password

☐ I'm not a robot

☐ Remember me

[Sign in](#) [Forgot Email](#) [Forgot Password](#)

Administrator (Administrator)
.02 GB | 0%
Carbonite uninstalled from computer on Nov 13, 2018

Carbonite Default  
Pending - new policy should be applied within 24 hours.

2. Find the appropriate computer(s) in the *Computers* tab. Then click the dropdown under *Backup Policy* and select the new backup policy name for this machine. The policy will deploy to the selected computer within 24 hours.

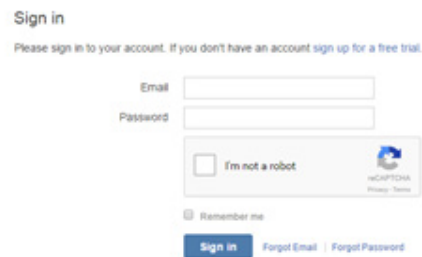
## Remote Deploy and Management

Carbonite's Remote Deploy and Management feature allows account Administrators to adjust the backups for all computers on the account from one location on the network. You can use Remote Deploy and Management via many different methods, and it can be used to accomplish a variety of things. See the chart below for a breakdown of which actions can be performed by which methods:

		Method						
		Active Directory	Kaseya	Labtech	Microsoft Software Center	Command Prompt	Batch Script	PowerShell Script
Action	Install/Reinstall Carbonite	x	x	x	x	x	x	x
	Deploy a single backup policy	x	x	x	x	x	x	x
	Deploy multiple backup policies at once						x	x
	Set upper limit backup speed	x	x	x	x	x	x	x
	Throttle all backups or initial backup only	x	x	x	x	x	x	x

For full instructions on all methods and actions, please [click here](#) to review our highly detailed Knowledge Base article. In the following example, we will be using Command Prompt to reinstall Carbonite and deploy a single backup policy to all computers on the network.

1. Log into your account as an Administrator or Billing Owner at [account.carbonite.com](https://account.carbonite.com).




Sign in

Please sign in to your account. If you don't have an account sign up for a free trial.

Email

Password

☐ I'm not a robot 

☐ Remember me

[Sign in](#) [Forgot Email](#) [Forgot Password](#)

[Invite others to back up](#)  
Let other people at your company install Carbonite and back up to this account

[Deploy to many computers](#)  
Using a Windows .msi command-line installer

2. From the Backup Dashboard, click **Deploy to many computers**.

3. Take note of your COMPANYID number on this screen. You will need this later in the process.

You will need to pass through two parameters when running the installer:

1. COMPANYID - yours is

SAMP-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX

2. POLICY - the name of the [backup policy](#) you want to use

[Download the installer](#)

This .msi installer will install Windows computers whether or not they are already running Carbonite.



4. Click the **Download the installer** button further up the page.

5. Click **I agree**, download installer in the Terms of Service. An .msi installer file will download to your machine.
6. Run Command Prompt as an administrator by pressing the **Windows Key + X** on your keyboard, then clicking **Command Prompt (Admin)**.
7. You will need to enter a command in Command Prompt on your computer, but parts of this command must be changed before running it to work with your environment. The code is as follows:

```
MSIexec /i "[LOCATION-OF-MSI-FILE]" COMPANYID=[YOUR COMPANY ID FROM ACCOUNT]  
POLICY="[NAME OF POLICY YOU ARE DEPLOYING]" THROTTLE_KBPS=[###] /quiet
```

- Replace **[LOCATION-OF-MSI-FILE]** with the folder location where your .msi downloaded.
  - For instance: if you left the folder in the usual default download location, you would enter **"c:/users/[your username]/downloads/carbonitesetup.msi"** (replacing **[your username]** with your Windows username)
  - Note that the location is inside of quotation marks ("").
- Replace **[YOUR COMPANY ID FROM ACCOUNT]** with the COMPANYID you noted in step 4.

- Replace **[NAME OF POLICY YOU ARE DEPLOYING]** with the name of the policy you want to set your computers to.
    - Note that the location is inside of quotation marks ("").
  - **THROTTLE\_KBPS=[###]** is optional. You can run the command without this text. If included, replace **[###]** with a whole number. The backup for the computers in your account will move no faster than the number you entered (in kilobits per second).
  - The **/quiet** flag ensures that the destination computers do not show the installation happening. If you run the command without this flag, your users will see a Carbonite installer pop up and run on their machine and may have to click a few confirmation buttons. Running the code with this flag will not distract your end users and won't require clicking confirmation buttons.
8. With the code adjusted properly, press **Enter** to run the command. Allow a minute or so for the installations to finish. To verify that it applied correctly, log into your account and check the Computers tab. They should all show the new backup policy name.

COMPUTER ▼	USER	STORAGE	BACKUP STATUS	BACKUP POLICY
 Carbonite	John Doe (Administrator)	.02 GB   0%	Restore in progress	<div>Carbonite Default ▼</div> <div>Pending - new policy should be applied within 24 hours.</div>
 Office	Jane Doe (Administrator)	.02 GB   0%	Last backed up Oct 10, 2018	<div>Carbonite Default ▼</div> <div>Pending - new policy should be applied within 24 hours.</div>

- If the backup policy did not update, check the code you entered in Command Prompt and retry. You will not see an error if the code is entered improperly.

# Troubleshooting Common Issues

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## Installation Problems

Installation issues are almost always caused by an incompatible setting in a different program or component on your computer that interferes with Carbonite's ability to connect to the backup servers. We have a detailed Knowledge Base article to help get around many of these problems: [click here](#), or search our Knowledge Base for "difficulty installing carbonite".

## Stuck Backup Problems

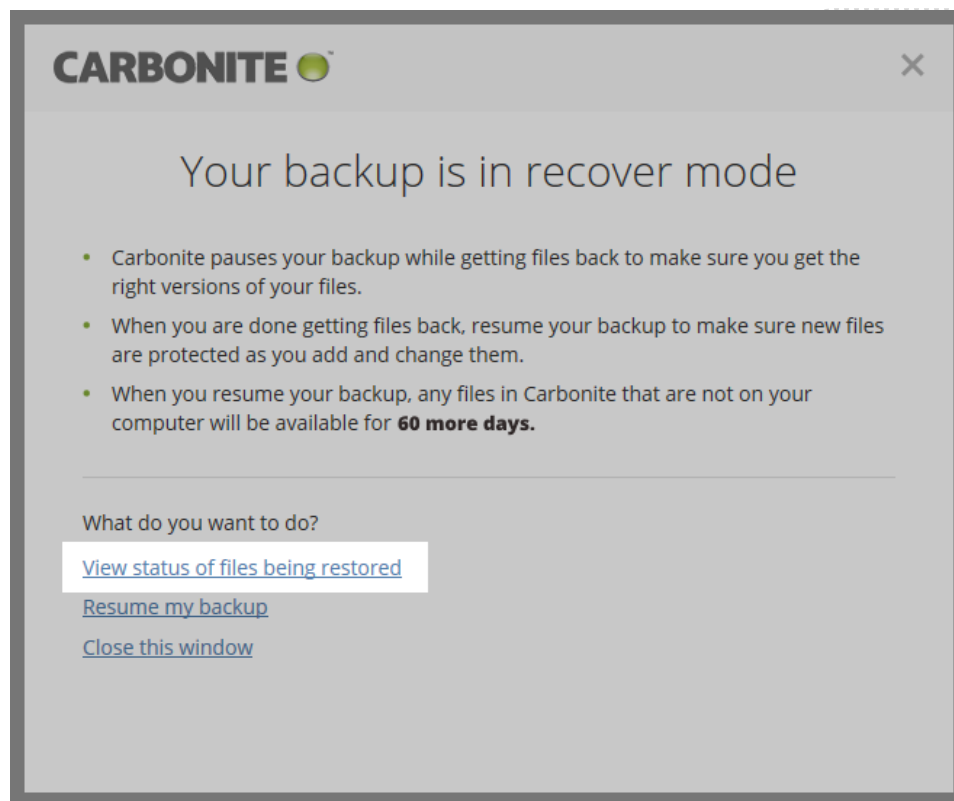
If you think your backup appears to be moving slow or is stuck on a file, follow this checklist to make sure none of these settings are the issue.

1. Your backup may seem stuck if your internet connection is slow. Check your Internet access speeds to determine whether your connection is fast enough to support data transference. If your connection is too slow, you may need to contact your Internet Service Provider. We also recommend checking the following:
  - Ensure that your computer does not go to sleep or hibernate.
  - If possible, switch from Wi-Fi to a wired internet connection. If you are unable to do so, please ensure that your computer is as close as possible to your wireless router.
  - Power off your modem and/or router for 60 seconds and power it back up before attempting another backup.
  - Ensure that your laptop lid is not shut.
  - Ensure that your computer stays on if there are a lot of files still pending backup.
2. Restart the computer to refresh system resources.
3. Ensure that the **Carbonite Service** is enabled in the *Microsoft Management Console*.
4. Ensure that there are no files selected for backup with file paths longer than 256 characters. Carbonite may not be able to back up files with file paths longer than 256 characters. Shortening the file path of these files will allow them to be backed up normally.
5. Close all programs that may be continually trying to access or lock your files (such as other backup software, disk defragmenters, etc.).
6. Ensure that your hard drive is not full or close to being full. We recommend at least 15-20% of free hard drive space.
7. Refer to the [Backup Overdue](#) article in our Knowledge Base for additional information about troubleshooting a stuck or overdue backup
8. Ensure that Carbonite is allowed through any firewall(s) or Anti-Virus software:
  - Temporarily disable *Windows Firewall* so that Carbonite can have free access to the Internet and your system.
  - Temporarily disable *Windows Defender* so that it does not conflict with Carbonite while it is scanning and backing up your files (this program is installed on Windows Vista and Windows 7 by default).

## Stuck Restore Problems

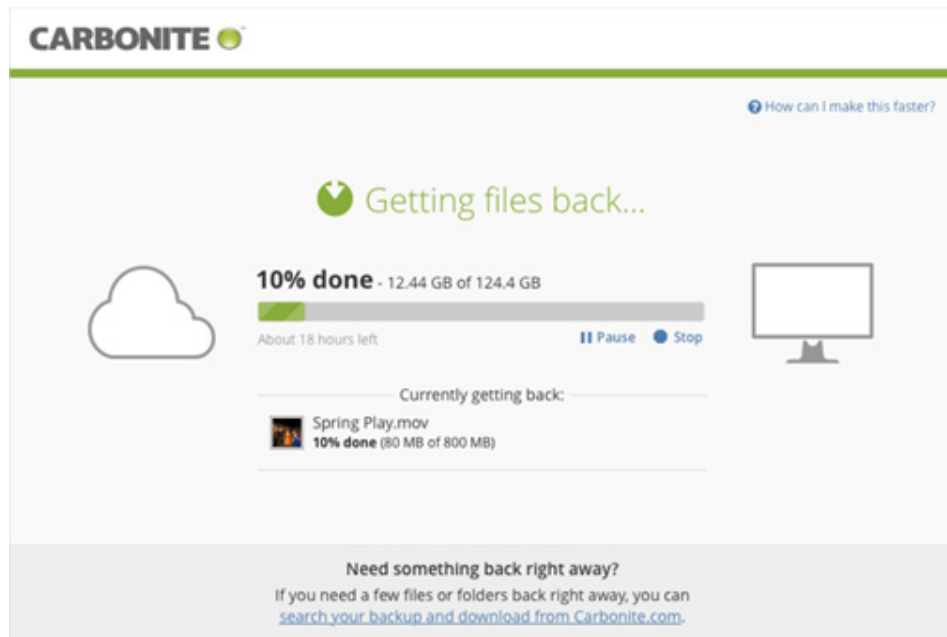
You can see your restore progress in the *Restore Manager*. If Carbonite is restoring files to your computer, it will restore them as fast as your internet connection and bandwidth allows. If the Restore Manager appears to be stuck on a file for a long time, there are a couple things you can do to make sure things are progressing.

1. Close the *Restore Manager* by clicking the red X in the top right corner (This will not stop a running restore).
2. Open the Carbonite application by double-clicking the Carbonite logo in your system tray or on the desktop.
  - You should see a notification that your backup is in *Recover mode*.
3. Click the **View status of files being restored** link near the bottom of the popup.



4. See if the Restore Manager has progressed beyond the stuck file. If so, it may have been just the display that was stuck, not the restore itself.





Another thing to keep in mind is that Carbonite restores one file at a time. If it is restoring a very large file (multiple GB in size), the Restore Manager may display the same file name for several hours as it is downloading. It will progress normally once the file has returned to your computer. Furthermore, if the internet connection is interrupted in the middle of restoring a file, Carbonite must start that particular file over when the computer reconnects. It cannot resume a partially restored file.

If you have ruled out display and connection issues, please search our [Knowledge Base](#) for more assistance.

# The Carbonite Knowledge Base

If you have a question about Carbonite that isn't covered in this handbook, our frequently-updated Knowledge Base contains information about every facet of Carbonite.

Carbonite Knowledge Base: <https://support.carbonite.com>

## Searching the Knowledge Base

Our Carbonite Knowledge Base is available for you anytime you need. Simply go to [support.carbonite.com](https://support.carbonite.com), input a search term or question, and click **Search**.

### Carbonite Support Knowledge Base



Hi I'm Cara, welcome to the Carbonite Knowledge Base. In a few words tell me what you need help with, and choose the Carbonite product you're asking about.

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